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# Souths of the world: The conceptual framework

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# Souths of the world: The conceptual framework

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by Paolo Perulli

## North/South

**T**oday the Norths (Europe, North America) and Souths (Africa, Latin America, Asia) are on opposite sides of the «development» divide. However the changing rate of development of China, India and other developing countries has impressed a new dynamics onto world history. The main hubs of the global economy are in North America, China and Europe: the other continents are not hubs. Culturally, the Norths and Souths are in opposition because of the legacy of colonialism and post-colonialism. Conceptually we need to restart a dialogue to imagine a «new world» made of different Norths and Souths together. In fact, even the concept of the Global South as opposed to the Global North is not a good idea, because it makes the historical divide even stronger. We need to criticize the North conceptual and economic «apparatus» of domination (a very complex machinery indeed) and recreate a common lexicon able to make the world more just and equal. The task is enormous, given the ancient long-lasting opposition.

In this paper we will analyze theories, but also economic facts. We follow Walter Benjamin's idea that «facts are already a theory»: we can therefore abandon any abstract deduction, prognosis or judgement as economic facts, and not «spiritual» elements, are the driving force. This approach can be shared by Northern and Southern intellectual forces looking for a dialogue.

First of all we will examine the dualism between North and South. It is a matter of economic domination: When did it start? And what are the social forces producing the turn?

«Men identified two forms to name their points of view, their impressions» Parmenides (*Perì Physeos*, fr. 7/8) refers to the two forms of light and darkness: these forms allow men to name things and to orient reality. This dualistic approach of Western thought, oppositional and dialectical, is the starting point for understanding how the West has built the East, and even more so how the North has built the South of the world. There have been exchanges and interactions, of course, between West and East, and between North and South. The whole of cosmopolitanism testifies to this. Yet history has certainly not gone in the direction desired by cosmopolitanism: «the recognition of our responsibility for every human being»<sup>1</sup>.

The two significant categories North and South represent the polarity of the world. As Simone Weil suggested, «the earth is an embroidered fabric on the axis of the world which joins the two poles»<sup>2</sup>. At the beginning, this image of the world reflected the first navigations. The geographical-geostrategic category of the South (the direction given by the «discoveries» to the world after the XVI<sup>th</sup> century) would go hand in hand with a political category of domination and subjugation only at a later date.

The position of opposite signs: developed North/backward South, which is also a position of values and non-values, continues to the present era. When did this construct begin?

The South Pole has not always been in an inferior position. In *Perì Ouranou*, the cosmogonic treatise on the sky that dominated ancient and medieval thought, Aristotle referred to the celestial South Pole as «the one

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<sup>1</sup> K.A. Appiah, *Cosmopolitanism. Ethics in a World of Strangers*, New York-London, Norton & Company, 2006.

<sup>2</sup> S. Weil, *Quaderni*, IV, Milano, Adelphi, 1993, p. 324.

above»; Chinese compasses were originally oriented to the South; the first Arab maps were oriented to the South<sup>3</sup>.

Herodotus, the first ancient historian of the West, places Asia to the East, Libya to the South, Europe at the center – the three female names of the Earth; but Europe is the Greek world, while the North of the Scythians, the Celts and beyond is a fabulous and unknown foreign land. The East is Babylon that, Herodotus observes, «has no rivals among the other cities known to us»<sup>4</sup>.

At the beginning, and for a long time after that, the Mediterranean South is therefore defined by the rational and refined, mathematical and artistic Hellenistic Greek and then Arabic culture, as opposed to the unknown, uncultivated North. This view holds until the year 1000<sup>5</sup>. When was this vision reversed?

### Capitalism enters the scene

Capitalism is certainly a North European and American phenomenon: the South becomes a pure appendix to it, a territory to be exploited and kept out of the circuit of valorization. Albert Hirschman<sup>6</sup> explains that the underdeveloped countries «are set apart, through a number of specific economic characteristics common to them, from the advanced industrial countries». This has actually happened by imposing distinct social and proprietary «extractive» structures (such as landed estates and the exploitation of raw materials) along a belt that extends from Southern Europe to Africa, Latin America, South-East and South Asia. Their entry into capitalism (as defined by Weber «the satisfaction of daily wants through capitalism») is

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<sup>3</sup> E. Leane, *South Pole. Nature and Culture*, London, Reaktion Books, 2016.

<sup>4</sup> Herodotus, *Istoriai*, I.

<sup>5</sup> Cf. D. Abulafia, *Il Grande Mare. Storia del Mediterraneo*, Milano, Mondadori, 2016, on the historical changes of the role of the great sea.

<sup>6</sup> A.O. Hirschman, *Essays in Trespassing: Economics to Politics and Beyond*, Cambridge, Mass., Cambridge University Press, 1981.

recent and partial. The ability to transform near and far territories into markets would only emerge much later in Africa, Asia and South America. Global history<sup>7</sup> traces this process: the true hallmark of leading countries is a State capable of protecting its domestic markets, guaranteeing access to distant markets and creating infrastructures. This explains why States were not developed in the Souths, and remain weak today.

A century ago, the entire South-East area of the world was still under Western colonial rule. Colonial Africa stretched from the Mediterranean to South Africa. Today the gears of capitalism turn faster in the South-East. Here decolonization has left wide gaps that capitalism has not yet filled. The forms of economy range from the formal to the informal: the informal economy accounts for 85% of jobs in Africa, 68% in Asia and the Emirates, 40% in America and 25% in Europe<sup>8</sup>.

According to Hernando de Soto, the explosion of extra-legal activities in the cities of emerging countries is due to the lack of property rights, which does not allow poor populations to enter the capitalist circuits<sup>9</sup>. Property rights remain closed in a glass bell and do not extend to the poor. The actors of extra-legal activities (illegal construction, occupation of space etc.) are locked up in circuits that cannot be adapted to transactions, and so are legal property rights, in which every fragment of land is a property title that can be traded on the markets. Yet these anti-legal behaviors are rarely anti-social or violent. They have become illegal organizations that provide goods such as water, roads and transport and against which legal governments retreat. In the absence of the State's public urban management, demand for housing, transport, water and sanitation is in the hands of

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<sup>7</sup> As the one by Sven Beckert, historian and economist, in *L'impero del cotone. Una storia globale*, Torino, Einaudi, 2016.

<sup>8</sup> International Labour Office, *Women and Men in the Informal Economy: A Statistical Picture*, Geneva, 2018, available online at [https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/publication/wcms\\_626831.pdf](https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/publication/wcms_626831.pdf).

<sup>9</sup> H. De Soto, *The Mystery of Capital*, New York, Bantam, 2000.

citizens' initiatives, in Mumbai<sup>10</sup> as in African cities<sup>11</sup>, in a context of deteriorating urban ecosystems.

### The «rest of the world» advances

Much has changed since the 1980s. The «rest of the world»<sup>12</sup> has developed faster than the West, first through «developmentalist» States and national banks that have supported the growth of infrastructures and industry, then through a growth in exports. The turning point took place in the 1980-1990 decade: the growth rate of exports was 12.9% in China, 15% in Korea, 14.8% in Taiwan, 14% in Thailand and Turkey. India was at 7.3%, behind the other emerging countries. But North Africa was at -3.8% and the whole of Africa at -1.3% (an aggregate figure that does not, however, take into account the great differences between the 54 African countries). The Souths of the world are divided: on the one hand Asia and on the other Africa. In the same years, export growth was only 5.7% in the United States, reversing the previous trend. Brazil and Argentina were at 5.1% and 2.1%, losing speed compared to the «rest of the world».

The process intensified over the following three decades. The industrialization-urbanization-social mobility trigger already experienced in the West worked once again, this time in the South-East. In the same manner? The world's factory moved to China (in terms of capital accumulation) and created a new global middle class (we can discuss the correctness of such term). The data are known but they have not been interpreted from a development theory angle. According to a historical interpretation<sup>13</sup>, starting in 2008, the long economic expansion of the neoliberal era shows that it is

<sup>10</sup> A. Appadurai, *Deep Democracy: Urban Governamentality and the Horizon of Politics*, in «Environmnet & Urbanization», vol. 13, n. 2, 2001.

<sup>11</sup> P. Hugon, *L'économie de l'Afrique*, Paris, La Découverte, 2013.

<sup>12</sup> A.H. Amsden, *The Rise of «the Rest»: Challenges to the West from Late-industrializing Economies*, Oxford, Oxford University Press, 2001.

<sup>13</sup> V. De Grazia, *The Crisis of Hyper-Consumerism: Capitalism's Latest Forward Lurch*, in J. Kocka and M. van der Linden (eds.), *Capitalism: The Reemergence of a Historical Concept*, New York, Bloomsbury Academy, 2016.



not the result of savings and investments but of the massive relocations of the global manufacturing economy that coincide with the take-off of Asia and the decline of the West. These relocations have been accompanied in the West by unsustainable development, increased inequalities, excess financial capacity, increased sovereign debt and private consumer debt. In the emerging countries, certain stages have been skipped (leapfrogging) in a very short period of time. This also does not fit in with the standard theories of capitalist development.

Over the last two to three decades in China, poverty has drastically decreased (3% of the population), while it concerns – albeit with significant differences between countries – 43% of the population in Africa (it was 54% in 1990). But poverty is paradoxical. Africa is one of the most unequal continents, with the highest Gini index in the world in some Southern or oil countries<sup>14</sup>. In Latin America, on the other hand, poverty has been reduced from 41% to 26% in the last twenty years, the result of a period of relative prosperity, albeit with strong inequalities. This is the result of a model based on the export of raw materials and semi-finished goods in the primary sector that has been defined as the «re-evaluation of the primary sector» of the Latin American economy<sup>15</sup>. But Africa itself is not only a differentiated continent (today Ethiopia and Ghana grow more than China in terms of GDP growth). Each country is also internally stratified (in South Africa, the most industrialized country in Africa with a per capita GDP of over 6,000 dollars, chronic poverty affects the black and coloured population, while the middle class includes a portion of both the white and black population, whereas the elite is only white with a small number of Asian Indians).

Africa remains a rent economy (over land and subsoil) despite the diversification of economic partners and the resumption of growth from the beginning of the XXI<sup>st</sup> century. In the meantime, the increase in GDP per capita

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<sup>14</sup> P. Hugon, *L'économie de...*, cit.

<sup>15</sup> REDEUS, *El camino de Latinoamérica y el Caribe hacia la sustentabilidad urbana*, eds. Margarita Greene and Juan de Dios Ortúñez, Santiago de Chile s.d., ARQ ediciones.

in China and India has been spectacular over the last three decades<sup>16</sup>: this explains why global inequality (localized, between countries) has decreased while (class) inequality within countries has grown. From Marx to Fanon and now back to Marx: this was the trajectory<sup>17</sup>.

### Changing the interpretative framework

We have seen that many distinctive economic, political, legal and social characteristics of Western capitalism are not present in the capitalist experiences in the East and Souths of the world. Have transformations occurred outside the West (in China, India, the United Arab Emirates etc.) in terms of the presence of institutional and cultural factors in favour of capitalism, understood as a system based on wage labour relations within market regimes? If so, which ones? According to the Weberian model, it would be a non-dualistic ethic favourable to the market, the first introduction of a rule of law to guarantee contracts, an entrepreneurial State, the role of free cities and the impulse of urban migration to development etc. However, the recent capitalist development in the emerging countries of Asia, Eastern Europe, the Middle East and Africa has not taken the form of liberal democracy except in some cases in Latin America. This challenges the entire interpretative framework available so far and opens up new suggestions.

Does the current reaction of the nationalist-indigenist-populist South, which is now also a «developer» South, justify the emerging theoretical category of Global South as opposed to Global North? It is a very questionable, heterogeneous category. Its nature is based on the «opposites», as stated by important post-colonial authors such as Kwame Anthony Appiah<sup>18</sup>: «The opposite here is a non-Western world in Africa, Asia, and Latin America – now dubbed “the Global South” – though many people in Latin America will claim a Western inheritance, too. This way of speaking consid-

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<sup>16</sup> Between 6-7% per year, although India's growth is estimated at 4.5%.

<sup>17</sup> B. Milanovic, *Global Inequality*, Cambridge, Mass., Harvard University Press, 2016.

<sup>18</sup> K.A. Appiah, *The Lies that Bind. Rethinking Identity*, London, Liveright Pub Corp, 2018, p. 191.

ers the whole world, but lumps a whole lot of extremely different societies together». Of course, this is not only a theoretical category, but also a political one: think of the role attributed to the BRICS (Brazil, Russia, India, China and South Africa) in the last two decades, a questionable conceptual construct that has assembled different countries that have experienced different evolutions. Should we not rather differentiate between the «Souths»?

A key theme is demographic growth and the prospects for migration. Does the demographic variable push the world to the South, which is preparing to «invade» the North? This is a questionable interpretation. By 2050, three African States, Nigeria, the Democratic Republic of Congo and Ethiopia, will have 800 million inhabitants. Today, the migration rates of these countries are irrelevant. These countries are, however, destined to play an increasingly important role in global and, above all, demographic dynamics.

Capitalism, seen as a regime of market and wage labour relations, remains fragile in the South, from Mediterranean Europe to Brazil, Africa, and India. A new form of capitalism is developing only in the East, which is perhaps an «imperial» frontier that will end up transforming «the Souths» (Africa, India, Latin America) along new directions and reversing the relationship between East and West?

### **The construction of the South as a category**

Our research begins first by questioning the classics, following the conceptual construct of the South through books and symbol-authors such as Antonio Pigafetta<sup>19</sup>. Pigafetta illustrates his meeting with the South American natives that Captain General Magellan called Patagoni (with large feet). «Most of them wear the skins of the above mentioned animal, and have no stable home, they use the animal skins to make themselves a hut, and move from one place to another; they eat raw meat and a sweet root,

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<sup>19</sup> A. Pigafetta, *Relazione del primo viaggio intorno al mondo*, Milano, Rayuela Edizioni, 2019.

which they call *capar*. This giant of ours would eat a piece of biscuit instead, and drink half a bucket of water at a stroke». The approach to the South of the world, even at the highest levels, was henceforth dominated by the image of the deformed native. Shakespeare – in *The Tempest*<sup>20</sup> – sets the play on an island at the heart of the Mediterranean – the king of Naples is shipwrecked there. The island, however, is both the Caribbean and Patagonia, and the native Caliban, a wild and deformed slave taken from Pigafetta's *Viaggio* evokes an image of diversity. The island is both a utopian place and a frightening land; it is a labyrinth but at the same time a heavenly place; it includes all the building blocks of the Souths of the world; the deformed and wild native conveys the need of the dominant culture to «lie» when representing the «other». This is the thesis of the Anglo-Ghanaian philosopher Kwame Anthony Appiah, who in the cited text proposes a culture of differences and mixtures where belief, country, colour, class and culture are the result of hybridizations, and are thus based on a lie.

By updating these concepts, Appiah shows that ties such as religion are not only based on beliefs but on shared social practices and rituals; that the nation is an artificial construct and the fruit of an invention, as evidenced by today's Singapore or Ghana, where different religions and languages co-exist; and that race is a scheme written by successive generations. On the contrary, class is a stronger bond than the alleged meritocratic social mobility; and culture is the result of a project, which can bind different peoples, the values of European humanism can belong to an African or an Asian who assumes them with enthusiasm as much as to a European, who might neither assume nor absorb them – as may happen in our current era. Appiah relativises the formation of an idea of Western culture, fixing its birth in the early XX<sup>th</sup> century with Spengler<sup>21</sup> and then with the Cold War that opposed the West to the East. But it is a reductive vision that largely ignores the long previous historical link, which goes from Humanism to Modernity. In short, however, despite these weaknesses, post-colonial thinking – as will be dis-

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<sup>20</sup> W. Shakespeare, *The Tempest*, London, Macmillan International, 2008.

<sup>21</sup> O. Spengler, *The Decline of the West*, Oxford, Oxford University Press, 1918.

cussed later – rightly relativizes the West, it «provincializes» Europe within an intercultural vision of the mixing.

## Colonialism

Colonialism, on the other hand, has pursued a strategy of incorporation of the other, depriving it of a part of its own: the Muslim, the Indian, forced to say a Christian truth, must lie to themselves, the dominant culture encourages imitation and identification, argues Homi Bhabha<sup>22</sup>. Only Montaigne, in the middle of the 1500s<sup>23</sup>, argued that there is nothing barbaric and wild about those peoples, simply everyone calls barbaric what is not their custom. His remains an isolated voice. Up to Vico, who at the beginning of the 1700s criticized the Greeks «who believed themselves to be so superior to other peoples, as to ask the question full of pride: “Are you Greek, or barbarian?” as if they themselves were half and the best part of all the peoples of the earth»<sup>24</sup>. But all XVIII<sup>th</sup> century «progressivism» goes in a completely different direction: Douglass, Turgot, Voltaire, Kames, Smith, Ferguson, de Pauw, Millar and Robertson identify a theory of the stages of development of humanity against a wild and primitive condition. In addition to justifying slavery, this vision has a precise, Eurocentric geographical and anthropological component. «The peoples living beyond the polar circles and in the tropics are inferior to the rest of the human species», Hume claimed; and Saint-Simon affirmed the indisputable gap between the Europeans («sons of Abel») and the inhabitants of Asia and Africa («descendants of Cain»)<sup>25</sup>. Alexander von Humboldt<sup>26</sup> was the first proponent of a unitary vision of the distribution of varieties of the human species. Humboldt defines language as «the mysterious labyrinth in which the connection of physical powers and

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<sup>22</sup> H. Bhabha, *The Location of Culture*, London-New York, Routledge, 1994.

<sup>23</sup> M. de Montaigne, *Dei cannibali*, in *Saggi*, Roma, Gherardo Casini Editore, 1953, pp. 209 ss.

<sup>24</sup> G. Vico, *Il metodo degli studi del nostro tempo*, in Id., *Metafisica e metodo*, Milano, Bompiani, 2008, p. 155.

<sup>25</sup> Cf. A. Burgio, *Tra utopia e rimozione: considerazioni sulla storia del progresso*, in C. Altini (ed.), *Utopia. Storia e teoria di un'esperienza filosofica e politica*, Bologna, Il Mulino, 2013.

<sup>26</sup> A. von Humboldt, *Kosmos*, Cambridge, UK, Cambridge University Press, 2010.

intellectual forces manifests itself in many different forms» and affirms that nations «are to the same degree destined to freedom, a freedom which in the harshest social conditions belongs only to the individual, but in social states which enjoy political institutions belongs by right to the entire body of the community». In his thought there are already elements of a comparative sociology of development based on the amalgamation of nations.

Alexander, Rome, the Mexicans and the Incas have caused the end of many tribes and independent nations in the two hemispheres, and have led to the creation of the most extensive international combinations. The idea of civilization has given rise to the desire to extend national relations: even selfishness is learning that this course will serve its interests more than a violent and forced isolation.

This prepares one for the reversal of the colonialist perspective by Joseph Conrad<sup>27</sup>. It is the first criticism of every civilization, starting with that of the Romans: the Mediterranean seaman who is ordered to leave for the North, the wild Britannia, «nothing better than armed robbery, manslaughter on a large scale», observes Conrad through the words of Marlow, the protagonist of Conrad's masterpiece. Until the denunciation of colonialism in Africa, against the darkness of civilization and the conscience of civilized man, no longer against the wild «demons» but against the civilized «monsters»<sup>28</sup>. The light-darkness opposition of colonialist ideology, e.g. in Stanley, is overturned in the denunciation of the «rapacious and ruthless madness» of the massacres and robberies against the Congolese tribes carried out by the agents of the Belgian King Leopold II: civilization produces «an inhabited devastation» in the «magnificent dependency» of the colonized territories.

In those same years, Max Weber defined the capitalist colonies as a «robbery economy»<sup>29</sup> not oriented by the rational organization of work, which is typical of Western modernity, i.e. where profitability is the basis of market opportunities. The point is essential to understanding the lack of develop-

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<sup>27</sup> J. Conrad, *Cuore di tenebra*, Torino, Einaudi, 1974.

<sup>28</sup> G. Sertoli, *Introduzione*, in J. Conrad, *Cuore di Tenebra*, Torino, Einaudi, 1974, p. 31.

<sup>29</sup> M. Weber, *Storia economica*, Roma, Donzelli, 1993, p. 211.

ment of the South: it remains a collateral economy, colonized and devoid of relations with modernity and the market. In this way, the social classes themselves, and the future local elites after decolonization, will take on the contours of patrimonialism, tribalism and familism. All of these are «Western» terms, and their applicability to the Souths of the world is under discussion.

### **The school of underdevelopment**

The term «underdevelopment» was coined in the 1960s within a group of critical economists and sociologists, including authors ranging from the German André Gunder Frank, to the Italian Giovanni Arrighi, to the American Immanuel Wallerstein. Their holistic readings of capitalist development, in cycles and phases, are at least partly indebted to the theory of Walt Rostow<sup>30</sup>: a «non-communist manifesto» aimed at creating for people in the initial take-off phase «a consortium to help them emerge». An influential theory (also on White House politics in the 60s and 70s), but spoiled by an approach to modernization as an «obligatory» way to inspire countries in the take-off phase, following the Western model. Criticisms from Gunder Frank and others have highlighted the historical simplification of Rostow's theory, which claims that all countries have gone through the same stages of development. The theories of economic development ignore many non-economic aspects that are crucial (social, cultural, anthropological). The economist Albert Hirschman<sup>31</sup> has highlighted these dynamic aspects as an alternative to the static theory of comparative advantages: the development process depends on economies in their capacity to take decisions and on incentives for political action. There are also backward and forward linkages, backward and forward connections that explain the economic development of companies and countries. When are imitative and cumulative effects triggered? Post-Keynesian economic theory is at this stage interested in establishing a stage of take-off for poor countries, the nature of which is associated with technical progress: exceeding a critical

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<sup>30</sup> W. Rostow, *The Stages of Economic Growth*, Cambridge, UK, Cambridge University Press, 1990.

<sup>31</sup> A.O. Hirschman, *The Strategy of Economic Development*, New Haven, Yale University, 1958.

value, the latter allows per capita income to grow at a higher rate than population growth<sup>32</sup>.

Other more critical authors place underdevelopment and underdeveloped countries within a system of interdependencies created and dominated by the leading countries of the West, and the United States in particular. This thought of underdevelopment is therefore intertwined with the reading of Marxist imperialism.

The critical economy of development of Albert Hirschman<sup>33</sup>, and today of Dani Rodrik<sup>34</sup>, moves to another level. They reread the development models of underdeveloped countries through the lens of policies and institutions assumed as decisive variables. Critics of the neoclassical and neoliberal economy, these authors highlighted the role of local knowledge, collective goods and democracy in promoting underdeveloped countries, and national industrial policies in explaining the success of emerging countries such as China and Southeast Asia as an alternative to the liberal recipes of the World Bank and the International Monetary Fund (the so-called «Washington consensus»). These theories have very effectively criticized the vision of modernization as an exclusively Western recipe, admitting a variety of paths that skip the stages and modify the phases and cycles in a «creative» way (a non pre-determinable concept typical of Hirschman).

Andr  Gunder Frank<sup>35</sup> rejected the Eurocentrism of all Western thought on Asia starting with Marx and Weber. Gunder Frank's thesis is that the superiority of the West over the East has no historical basis, at least for the period from the XIV<sup>th</sup> to the XVIII<sup>th</sup> century. During that period Asia surpassed the West in economic, technological and urban terms. Only from 1750 did Asia experience a widespread decline and was surpassed by

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<sup>32</sup> N. Kaldor, *A Model of Economic Growth*, in «The Economic Journal», vol. 67, n. 268, 1957, pp. 591-624.

<sup>33</sup> A.O. Hirschman, *Development Projects Observed*, Washington, Brooking Institution Press, 2014.

<sup>34</sup> D. Rodrik, *The Globalization Paradox*, New York, Norton&Company, 2011.

<sup>35</sup> A.G. Frank, *ReORIENT*, Berkeley, University of California Press, 1998.



the West, at the same time as the industrial revolution. But, according to Gunder Frank, West and East should be considered within a mutual global relationship: Western development itself was based not only on internal factors but on the accumulation of capital extracted from its colonies.

On another level, the English historian and anthropologist Jack Goody spoke in his works<sup>36</sup> about the alternation between Asia and Europe. Fruits from the same tree, and always strongly interrelated, Asia and Europe have alternated their roles. Asia was the first to dominate, followed by Europe, which dominated during the Renaissance and the Industrial Revolution, and today we are at a new «Asian» turning point. According to Goody<sup>37</sup>, it was a «theft of history» of non-Western civilizations and nations by Western Eurocentric culture: a discussion involving authors such as Marx, Weber and Norbert Elias.

The shift of the centre of gravity towards Asia is also central in Giovanni Arrighi's latest text<sup>38</sup>, which supports the nature of a market regime (Smith style) of contemporary Chinese expansion, which does not coincide with that of capitalism (Marx style). Marx in Detroit, Smith in Beijing: these, according to Arrighi, are the two trends of the 20<sup>th</sup> and 21<sup>st</sup> centuries, which may prelude a more balanced relationship between the great nations of the world.

### The post-colonial school

Postcolonial thinking moves in clear discontinuity with the previous traditions of colonialist and Eurocentric thinking.

For all post-colonial authors the geographical, geohistorical and geophilosophical reference is fundamental. The Palestinian-American literary historian Edward Said<sup>39</sup> was the first to write that the East is not an inert

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<sup>36</sup> J. Goody, *The Eurasian Miracle*, Cambridge, UK, Polity, 2010.

<sup>37</sup> J. Goody, *The Theft of History*, New York, Cambridge University Press, 2012.

<sup>38</sup> G. Arrighi, *Adam Smith in Beijing*, London, Verso, 2007.

<sup>39</sup> E. Said, *Orientalism*, New York, Pantheon, 1978.

material made of nature, a *there*- just as the West is not. Based on Vico's view that men make their own history and what they know is what they have done extended to geography, Said argues that geographical entities such as localities, regions, geographical sectors etc. such as East and West are made by man, and East is nothing more than the idea – with a tradition of thought, image and vocabulary – that gave it reality and presence *in* and *for* the *West*.

The Indian-American historian Dipesh Chakrabarty<sup>40</sup> argues that it is necessary to lead Europe back to the role of province among other provinces in the world. Chakrabarty puts into perspective the concepts of Western modernity such as citizenship, state, self-government, human rights, the individual, popular sovereignty. It criticizes any «abstract human occluding questions of belonging and diversity» and any tendency to «evacuate the local by assimilating it to some abstract universal» (p. 17). He criticizes Marx but forgets that he maintained that even the most abstract categories, although applicable to each period, are nevertheless the product of historical conditions and only apply within such conditions. Chakrabarty returns to the categories of disenchanted space, secular time, sovereignty and the association of modernity and secularization in Western thought, and wonders how the Western model can be applied to a region like South Asia (India in particular) where the population works for religious reasons. But he overlooks the fact that this root is present in the Weberian explanation – via Protestant sects – of capitalism in the West. Weber<sup>41</sup> also points out that in China and India the needs of the court and the army were covered through «forced liturgical services» by the peasants.

Chakrabarty's thought is one of the most original; he is now dealing with global history in the Anthropocene era.

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<sup>40</sup> D. Chakrabarty, *Provincializing Europe: Postcolonial Thought and Historical Difference*, Princeton, Princeton University Press, 2007.

<sup>41</sup> M. Weber, *Storia economica*, cit., p. 218.

Indian-American philosopher Homi Bhabha<sup>42</sup> has argued that «increasingly, “national” cultures are being produced from the perspective of disenfranchised minorities». He therefore takes the point of view of minorities deprived of their rights in an original path that seeks the interconnection, and not the cultural isolation, of subordinates.

The most significant effect of this process is not the proliferation of «alternative histories of the excluded» producing, as some would have it, a pluralist anarchy. What my examples show is the changed basis for making international connections. The currency of critical comparativism, or aesthetic judgement, is no longer the sovereignty of the national culture conceived, as Benedict Anderson proposes, as an «imagined community» rooted in a «homogeneous empty time» of modernity and progress. The great connective narratives of capitalism and class drive the engines of social reproduction, but do not, in themselves, provide a foundational frame for the modes of cultural identification and political affect that form around issues of sexuality, race, feminism, the lifeworld of refugees or migrants.

Bhabha provides a definition of post-colonial that sounds like this:

Postcoloniality, for its part, is a salutary reminder of the persistent «neo-colonial» relations within the «new» world order and the multinational division of labour. Such a perspective enables the authentication of histories of exploitation and the evolution of strategies of resistance. Beyond this, however, postcolonial critique bears witness to those countries and communities – in the North and the South, urban and rural – constituted, if I may coin a phrase, «otherwise than modernity». Such cultures of a postcolonial contra-modernity may be contingent to modernity, discontinuous or in contention with it, resistant to its oppressive, assimilationist technologies; but they also deploy the cultural hybridity of their borderline conditions to «translate», and therefore reinscribe, the social imaginary of both metropolis and modernity.

Bhabha thus encourages the cultural hybridization between the North and South of the world and is therefore extremely stimulating.

Bhabha states that «despite the claims to a spurious rhetoric of “internationalism” on the part of the established multinationals and the net-

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<sup>42</sup> H.K. Bhabha, *The Location of Culture*, cit.

works of the new communications technology industries, such circulations of signs and commodities as there are, are caught in the vicious circuits of surplus value that link First World capital to Third World labour markets through the chains of the international division of labour, and national comprador classes». He mentions Gayatri Spivak (another important postcolonial scholar), who «is right to conclude that it is in the interest of capital to preserve the comprador theatre in a state of relatively primitive labour legislation and environmental regulation».

This is a key point: the role of the compradora class (a term introduced by Paul Sweezy as early as 1957), that is, the local elites of the so-called underdeveloped countries that mediate between the multinational economy and the local system, that has represented the linkage of extractive policies in all the Souths of the world, that have «extracted» local resources for the benefit of restricted local oligarchies and powerful external groups.

An important theory is that of the German sociologist Karl Wittfogel<sup>43</sup>. He proposed an interpretation of Eastern despotism in this same key: extraction and control of water resources as a basis for imposing despotic political regimes and full control of human resources completely dependent on the authorities, in China, India etc., with the possibility of extending this theory of despotism based on water resources to the current meeting between Eastern regimes and modern capitalism.

More recently, the explanation of why nations fail<sup>44</sup> or develop has been entrusted to the role of «extractive» policies: the explanation of why Sub-Saharan Africa, some Latin American and Asian countries remain among the poorest in the world could be due to the extractive institutions (of resources, of semi-slavery work, of raw materials) that govern them. Whereas nations that develop do so thanks to «inclusive» policies that, through the

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<sup>43</sup> K. Wittfogel, *Oriental Despotism*, New Haven, Yale University Press, 1957.

<sup>44</sup> D. Acemoglu and J.A. Robinson, *Why Nations Fail: The Origins of Power, Prosperity and Poverty*, London, Crown Publishers, 2012.

markets and pluralist democracy, involve the population in the creation and distribution of wealth. The explanation does not take into account evidence that the countries that are growing the most are China, the Emirates and India, which cannot easily be defined as «inclusive».

Indian-American anthropologist Arjun Appadurai<sup>45</sup> criticizes the theories of modernization that have not been able to predict the developments of the contemporary world. Religion's refusal to give way to development and science (one point to be developed); the paradox of new information technologies multiplying cultural differences instead of producing an identical entity (another critical point); the recourse of peoples to violence and ethnocide instead of the institutions of democracy (the current creeping world war) would represent some of the predictive failures of the theories of modernization. For Appadurai, Weber was unable to adequately develop an association that would connect great civilizations, religions and economies without falling into the vision of an exclusively Western trajectory («the great narrative of the West»). Weber, however, as studied by European sociology and philosophy of the last thirty years, is instead (as opposed to Appadurai) a theorist of the permanent *tension* between different forces, and the internal autonomy of the different spheres – religious rational ethics, politics, art, erotic sphere etc. – is polytheism of values and polymorphism of forms, never a *homologating convergence* of social changes at world level.

The Portuguese sociologist Boaventura de Sousa Santos<sup>46</sup> proposes an epistemology of the South, or rather in the plural form:

the epistemologies of the South. First, the understanding of the world is much broader than the Western understanding of the world. This means that the progressive transformation of the world may also occur in ways not foreseen by Western thinking, including critical Western thinking (and that includes Marxism). Second, the diversity of the world is infinite. It is a diversity that encompasses very distinct modes of being, thinking and feeling; ways of conceiving time and the relations among human beings and between humans

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<sup>45</sup> A. Appadurai, *The Future as Cultural Fact*, London, Verso, 2013.

<sup>46</sup> B. Sousa Santos, *Epistemologies of the South*, Boulder, Routledge, 2014.

and non-humans, ways of facing the past and the future and of collectively organising life, the production of goods and services, as well as leisure. This immensity of alternatives of life, conviviality and interaction with the world is largely wasted because the theories and concepts developed in the global North and employed in the entire academic world do not identify such alternatives.

Postcolonial thought, despite its strong polemical approach, is nevertheless indebted to Western critical thought: the idea of Walter Benjamin<sup>47</sup> of the present, the Messianic standstill as a chance to crystallize a monad that interrupts historical time and rewrites the history of the defeated, is continuously cited and resumed (e.g., «the history of the defeated» in post-colonial urban studies by Ananya Roy and Aihwa Ong); as well as Michel Foucault on language as the basis of the exercise of power, Jacques Derrida on deconstruction etc. The strong debt to Western critical thinking is both the limit of «other» thinking and an opportunity for intercultural dialogue, but on what basis is this dialogue possible? Or is this debt nothing more than the acknowledgement that post-colonial thinking is out of place (the title of Edward Said's autobiography)? Out of place both with respect to Western thinking and with respect to the indigenous (Palestinian, Indian, African, Caribbean etc.) thinking to which it no longer belongs?

### **Moving the center of the world**

Seen from China, the vertical map of the world recently elaborated by the Chinese Academy of Sciences «changes» the world geography. In the new Chinese map, the USA is North of China, Eurasia has its pillar in China, imposing Africa stands to the left of Eurasia, which is today the land of greatest Chinese influence, while South America is at the bottom left, separated from North America (*People's Daily*, 20/5/2016). Everything is moving again in the representation of the world.

The major reversals of secular trends concern:

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<sup>47</sup> W. Benjamin, *Theses on the Philosophy of History*, London, Jonathan Cape, 1970.

a) *Urbanization*. Completely marginal until a few decades ago, the next urban expansion will be in the South-East of the world (China, India, Africa, where the largest cities in the world are already located in terms of number of inhabitants) while urbanization in the West is slowing down; the decisive game of natural resources is being played in the cities of the Souths of the world (in the words of UNEP, the United Nations Environment Program: «the city as a societal “node” in which much of the current unsustainable use of natural resources is socially and institutionally embedded»<sup>48</sup>).

The perspective can be approached from several points of view. One of them is the cost associated with urban development in terms of infrastructure, and sustainability linked to the consumption of natural resources. An indicator such as the land development multiplier<sup>49</sup> measures this cost and shows its very high values in the Souths of the world.

b) *The extraction of added value*. In the South-East of the world we are only now passing from the extraction of absolute surplus value to that of relative surplus value, and there are huge margins in Asia, Africa and Latin America. Postcolonial thinking has warned that dominant capitalism in emerging countries does not necessarily accompany the emergence of a hegemonic bourgeois class. Chakrabarty, with reference to the development of capitalism in India, warns that «this was capitalism indeed, but without bourgeois relations that attain a position of unchallenged hegemony; it was a capitalist dominance without a hegemonic bourgeois culture». Is a capitalist domination without bourgeois hegemony possible? In this perspective, social groupings may be different from those of Western modernity, and concepts such as elite, middle class, working class etc. will have to deal with the immense diversity of the «subordinate» social world in emerging countries. It will be necessary to see, thanks also to the so-called *subaltern studies*, if the models of the emerging countries are actually alternative to the Western ones<sup>50</sup>.

<sup>48</sup> UNEP, *Food Systems and Natural Resources*, Nairobi, 2016.

<sup>49</sup> S. Angel, *Housing Policy Matters. A Global Analysis*, Oxford, Oxford University Press, 2000.

<sup>50</sup> Ian Taylor is skeptical in, *Global Governance and Transnationalizing Capitalist Hegemony. The Myth of the «Emerging Powers»*, Abingdon, Taylor & Francis, 2016.

## Neoliberal thought

Neoliberal thinking in favour of globalization, such as that of the Indian-American economist Jagdish Bhagwati, argues that *free trade* in goods can be the optimal solution for the growth of emerging countries. Naturally, this poses the problem of asymmetries and unequal exchange between strong and weak countries.

Liberal thought itself also allows for variations and exceptions<sup>51</sup>. More recently, this is demonstrated by the opposition of Bhagwati *et al.*<sup>52</sup> to the inclusion in the Uruguay Round of the WTO of the TRIPs – trade-related intellectual property rights – which privilege the position rents of the multinational companies at the expense of the emerging countries, as is increasingly happening. Dani Rodrik<sup>53</sup> acknowledges that the free movement of capital can be harmful, as many economists and the IMF itself now claim. In fact the bilateral agreements, e.g. USA-Singapore and USA-Chile (2003), include the full circulation of capital flows without any restrictions. So do ISDS clauses, investor-state dispute settlements that allow foreign investors to sue host states before arbitration courts if states introduce regulations, taxes etc. that damage foreign investors' profits; procedures that are accepted by developing countries because of their weak legal framework, thus assigning all power to extra-legal arbitration. Moreover, many regulations in favour of the free movement of capital lead to a sub-optimal Nash balance as countries offer expensive conditions to attract mobile capital (as Rodrik shows: «In a world with mobile capital, governments are tempted to offer better terms to globally mobile corporations in order to compete for investment. This results in a sub-optimal Nash equilibrium with larger transfers to corporations and their shareholders than is globally desirable»).

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<sup>51</sup> J. Bhagwati, *La teoria pura del commercio internazionale*, in F. Caffè (ed.), *Il pensiero economico contemporaneo*, vol. 2: *Lo sviluppo economico*, Milano, Franco Angeli, 1969.

<sup>52</sup> J.N. Bhagwati, K. Pravin and P. Arvind, *The World Trade System: Trends and Challenges*, 2014, May, Unpublished paper, Department of Economics, Columbia University.

<sup>53</sup> D. Rodrik, *What Do Trade Agreements Really Do*, in «Journal of Economic Perspectives», vol. 32, n. 2, Spring 2018.



There are, however, corrective measures. According to Bhagwati<sup>54</sup>, «it is the companies themselves that set higher standards for production for the domestic market, so that foreign competition is forced to adapt or lose its market share». In other cases, the «Dracula effect» emerges: «evil is exposed to sunlight and this will be reduced to the point of disappearing», since «embarrassment, and even more shame and guilt, are instruments with which one can exert tremendous pressure». If this is not the case, «the only possibility is to counterbalance private disinterest by channelling [to developing countries] public aid, technical assistance and the altruism of corporations». And «to mitigate the dark side that globalization sometimes shows, an institutional change at the international level may be appropriate»: with much criticism of the World Bank and the IMF (pp. 349-356) and the WTO. «As the integration of world capital markets becomes more marked, it is counterbalanced by a series of strong institutions, which also includes trade unions and social democratic parties»; «the development of technological innovations that are more respectful of the environment is urged by anti-pollution regulations [...] because there is a greater awareness of environmental problems, [and] due credit must be given to environmental organizations». This point of view is important, as it attributes the task of correcting the dark side of globalization *a)* to the emergence of a moral point of view in the economy and *b)* to the birth of a civil society in the emerging countries.

### **New digital technologies and global value chains**

An emerging theme is that of new technologies in developing countries, which today is decisive for the strategic-competitive relations between the USA and China<sup>55</sup>. They can favour the growth of a local society in the absence of public investments in fixed networks or fixed capital.

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<sup>54</sup> J.N. Bhagwati, *In Defence of Globalization*, Oxford, Oxford University Press, 2004.

<sup>55</sup> Cf. Kai-Fu Lee, *AI Superpowers: China, Silicon Valley and the New World Order*, Boston, Houghton Mifflin Harcourt, 2018.

At the same time, the development of digital technology-driven global value chains (GVCs) in fragmenting and disseminating activities in many countries is not delivering the expected positive results in emerging countries (except partly in Asia, where mobile phone production is concentrated). A study conducted in 20 countries (7 in Asia, 4 in Latin America, 3 in the Middle East and North Africa, 6 in Sub-saharan Africa) confirms this. Since 2011, GVCs have spread at a lower rate than in the past, and their contribution to job growth in emerging countries has decreased. This is due to the fact that GVCs require forms of skilled labour that is scarce in developing countries, whereas in the past, export-led manufacturing activities may have resulted in the employment of unskilled (or low-skilled) workers.

The trends emerging from the study of three different sectors (horticulture, clothing, tourism) concern the following aspects: regionalization of value chains, further push towards the informalization of labour and consolidation of the dominant position of leading companies:

*Regionalization* – Trade liberalization, local labour market conditions, and the retail revolution in Africa have contributed to a growing trend of regional economic integration, particularly in SSA countries that participate in regional free trade agreements. In turn, this has led to the expansion of Regional VCs. Of the countries studied, South Africa and Kenya emerged as host countries for emerging regional lead firms across all three sectors: horticulture, apparel and tourism.

*Informalization* – Increasing consolidation, market trends (such as fast fashion and fruit), and rising competition from trade liberalization have led to downward pressure on retail prices. This has resulted in a growing pattern of informalization across industry sectors, which is problematic because informal workers have much lower access to decent work, secure employment, and social protections than formal workers. This stratification of the labor force has contributed in significant ways to the challenges of assessing whether social upgrading or downgrading has occurred, because the outcomes are highly dependent on worker status.

*Consolidation of lead firms' market power* – As competition and volatility have increased with trade liberalization, the market power of lead firms has increased. Large retailers and tour operators have expanded, while SMEs have struggled to stay competitive. This has exacerbated the uneven power dynamics within Global VCs and Regional VCs, resulting in a tendency of social downgrading due to lower bargaining positions for labour and smallholders.

On the impact of digitisation in Africa, it is argued that «African countries not only face a significant digital divide but also benefit less from increasing levels of digitalization. To digitalise manufacturing, African countries need to increase access to the internet and other information and communications technologies (ICT)»<sup>56</sup>.

## Commons

The other great challenge remains in the background, i.e. the great theme of *commons*, such as water and other natural resources. On the one hand, the right to water<sup>57</sup> is proclaimed, as in the *UN Subcommittee on the Promotion and Protection of Human Rights, Guidelines on «Extreme Poverty and Human Rights: The Rights of the Poor»* (24 August 2006): Point G-the right to drinkable water. «People living in extreme poverty have the right to drinkable water... If the State cannot do it alone, then it has an obligation to seek the help of the international community, which is bound to provide this assistance... The right to drinkable water is directly linked to the right to life. Negligence, failure to provide or planning not to provide water distribution services must be considered as an action that threatens human life». This approach addresses the international community as ultimately responsible, even beyond the capabilities of states, by resorting to international aid. On the other hand, a different and more recent approach has

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<sup>56</sup> K. Banga and D. Willem te Velde, *Digitalisation and the Future of Manufacturing in Africa*, London, SET-Supporting Economic Transformation, Odi-Overseas Development Institute, 2018.

<sup>57</sup> <https://www.ohchr.org/EN/Issues/Poverty/Seminar/Pages/DraftGuidingPrinciples.aspx>.

emerged, that of resilience on the part of local communities. The United Nations Conference on Habitat III (Quito, 2016) stressed that urban resilience refers to the way in which individuals, communities, territories and local economies can cope with the multiple shocks and natural tensions that today threaten the supply of common goods. This different perspective refers to the provision of both rural and urban ecosystem services, and the ecological footprint that characterizes contemporary urban development (65% of world energy consumption and 70% of anthropogenic coal emissions occur in cities).

## Urbanization

This vision, which is more attentive to the effective capacity of local communities (a recovery of Amartya Sen's capabilities) to face the global ecological crisis, refers above all to the *explosive process of urbanization* underway in the Souths of the world.

The trends of the urbanization process will be decisive. Studying cases as diverse as Buenos Aires and Beijing, it has been indicated that the process of urbanization will follow models that go from centrality to dispersal.

The possibility that cities worldwide are now in a process of transformation from a monocentric to a polycentric spatial structure poses an interesting challenge. It suggests that if public transport is to be a viable option in areas of expansion to economize on the energy expended and to limit greenhouse gas emissions, then it cannot be limited to continued reliance on radial routes to the city center. The transport network must be two-dimensional, providing frequent and reliable service among suburban destinations over the entire metropolitan area, rather than a one-dimensional network of radial routes into the center<sup>58</sup>.

In addition to circular and reticular, rather than traditionally radial models of transport and circulation, it will be important to develop models of integration between urbanized and cultivated land, both destined to grow, in

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<sup>58</sup> S. Angel, *Planet of Cities*, Cambridge, Mass., Lincoln Institute of Land Policy, 2012.

order to feed the growing urban populations – a theme of circular economy as an alternative to the hitherto dominant geararchic-pyramidal models.

## Conclusion

New intersections between the South and East, and between the South-East and North-West of the world, are only now about to develop, but their outlines and directions are not clear at all. «China in Africa» is an example of this: the FOCAC, Forum of cooperation between China and Africa, has established that

the two sides are of the view that, as China, the largest developing country, works to realize the two centenary goals and the Chinese dream of national rejuvenation, and as Africa, the continent with the highest number of developing countries, implements Agenda 2063 and is striving to build an integrated, prosperous and peaceful continent, the two sides share similar philosophies, compatible strategies and complementary strengths in terms of development. The two sides will take the Belt and Road Initiative as an opportunity to strengthen multi-dimensional, wide-ranging and in-depth cooperation for mutual benefits and common development (FOCAC Declaration in Beijing, September 2018, attended by 53 African States<sup>59</sup>).

The watchword is South-South cooperation (today Africa's trade with the countries of the South has already reached the level of Africa's trade with Europe), with Chinese investments in Africa and especially in the form of the provision of services and loans rather than in the form of classic FDI-foreign direct investments (foreign direct investments in Africa represent only 3% of the world total compared to more than 30% of the world total in Asia and 11% in Latin America<sup>60</sup>), and especially with exports of African

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<sup>59</sup> <https://www.tralac.org/news/article/13444-declaration-of-the-2018-beijing-summit-of-the-forum-on-china-africa-cooperation.html>.

<sup>60</sup> In 2017 global FDI (Foreign direct investments) dropped by 23%, developed economies' share of global outward FDI remained unchanged at 71%. Over the last two years, developed economies in America accounted for an increasing proportion. Their share rose from 20% in 2015 to 29% in 2017, thus reaching the same share as Europe. On the recipient side, Asia and Oceania strengthened their position as the main host region of FDI in the developing world, accounting for one third of world FDI. The share of American developing economies increased from 7% in 2016 to 11% in 2017, while the share of Africa remained at 3% (UNCTAD Handbook of Statistics, 2018).

oil and other raw materials to China (to pay for infrastructure projects or as collateral). In the background, the controversial issue of debt: through investments in infrastructure, there is a growing debt on the part of countries, and therefore a geopolitical dependence. China's priority in Africa is clearly political and strategic; but what mechanisms and hybridizations are underway in China's widespread presence on the African continent (about one million Chinese immigrants to Africa as owners of businesses, workers – in some cases forced labour? – and entrepreneurs; a less visible but widespread phenomenon alongside major infrastructure projects, urbanization and industrialization) is part of a new intersection between the African and Asian continents.

Although the influence of the United States in Africa is still that of the main donor/creditor country and the military presence remains strong, with 34 military bases on the continent, «quoi qu'il en soit, l'Afrique sera le centre de gravité d'un nouveau cycle de migrations planétaires. De nouveaux types de migrations se font en direction de l'Afrique – par exemple, celles des Chinois, des Turcs, des Brésiliens etc., transformant ainsi les villes africaines en capitales mondiales d'une imagination à la fois baroque, créole et métisse»<sup>61</sup>. As well as African migrations, they also turn towards Europe, India and China.

«Europe in Africa» is our current problem, an ongoing regression in development cooperation, in the planning of a Euro-Mediterranean role, and in the same «sociology» of the Mediterranean. The «France in Africa» that dominates French-speaking Africa, the «Turkey in Africa» that involves Muslim countries etc., are partners who play on their own, trying to face the Chinese advance and to create or maintain their own settlements, both of hard power (economy, military security) and of soft power (culture, knowledge, language, formation of the elites)<sup>62</sup>.

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<sup>61</sup> *Cahier d'Études Africaines*, 228/2018.

<sup>62</sup> O. Mbatia, *Structural Power Toward Weak States*, in «Austral-Brazilian Journal of Strategy & International Relations», vol. 3, n. 5, 2014.

We can therefore imagine that the greatest novelties will come not only from economic intersections (which is the most evident and important aspect) but between different civil, religious, political and scientific cultures, which will organise in *areas*, *regions*, *cities* that will be the actors of these intersections.

The 2030 Agenda of the United Nations organization maintains that «infrastructures and technological innovations must be combined with the fight against poverty and inequalities, with gender equality, health, education, inclusiveness, and the rational use of natural resources». This can be interpreted as a new alliance between the North and South of the world on different bases from the past. Or it could be the new rhetoric, the only normative and prescriptive voice against irresponsible capitalism and opportunistic states.

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