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Collective Action Within The Global South:

resolving collective action problems to narrow the North-South divide

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Abstract

This paper aims to discover viable ways in which the Global South can effectively challenge the primacy of the Global North and create a more equitable global order. This thesis is premised on a dependency approach to international relations which stipulates that the Global South, or Third World, is underdeveloped because of actions by the Global North, or the First World. The legacy left by colonialism can still be felt today as there still exists a relationship of exploitation and patronage between the First and Third World. Although the era of formal colonization may be over, the Third World is still lagging far behind the First World in political power. The lack of power available to individual Southern states makes it imperative that these states band together if they are ever to be in a position to bargain effectively against the North. Using this idea, of the need for collective action by the Global South, this paper looks at viable ways in which collective action can be achieved. Using theories pertaining to group theory, collective action and leadership, I examine in which direction Southern collective should proceed if the South wants to increase its bargaining power against the North. Two methods—international organizations and leadership—as proposed by Yoshimatsu (2006) are discussed and tested. Based on the results of my analysis, a comparison is conducted to determine in which direction Southern collective action should proceed.

Key Words: North-South relations, collective action, dependency, hegemonic stability

Word Count: 19,922

List of Abbreviations

G-20 Group of the top 20 national economies

SATO South Atlantic Treaty Organization

NATO North Atlantic Treaty Organization

G-8 Group of the top 8 national economies

G-192 Group of 192

UN United Nations

IMF International Monetary Fund

BRIC Brazil, Russia, India, China

NICs Newly Industrialized Countries

WTO World Trade Organization

OPEC Organization of the Petroleum Exporting Countries

OAPEC Organization of Arab Petroleum Exporting Countries

IO International Organization

NAM Non-Aligned Movement

G-77 Group of 77

UNCTAD United Nation Conference on Trade and Development

NIEO New International Economic Order

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1 Introduction

Dependency is a two-way street. The United States and Japan are equally dependent on the Third World for raw materials, cheap labor, and markets. The First World, however is dependent from a position of power. If Chile decides to nationalize its copper mines, the United States, and the multinationals centered there, have many alternatives: an embargo to destroy the heavily dependent Chilean economy, a cutoff of foreign loans and aid, manipulation of world copper prices, a shift of purchasing to another copper-producing country such as Zaire, or even the secret destabilization of the government (all of these were used against Chile between 1970 and 1973). A Third World country, on the other hand, has little power to support its demands

-Ted C. Lewellen 1995, p9

1.1 Background

While the G-20 Summit was going on, on September 25th, 2009, a parallel conference of world leaders was being held. The latter meeting was a two-day summit in Porlamar, Venezuela that brought together some of Latin America's and Africa's most prominent and outspoken leaders (Márquez, 2009). Proposals for a SATO–NATO-like alliance for the South–was one of the outcomes of these talks. Speaking at the Summit, Libyan leader Muammar al-Gaddafi called for greater unity between the two regions in order to gain more economic and political influence, and form a rival alliance to NATO. Claiming to speak on behalf of poor nations across the world, Gaddafi and Venezuelan President Hugo Chávez committed to working together to challenge the "imperialism" of wealthy nations (Fabiola).

Additionally, in light of the current global financial crisis, the standard G-8 Summit of the top eight national economies, was extended to the G- 20. The top twenty national economies met in an effort to produce a more "global" and egalitarian solution to the crisis. German Chancellor

Angela Merkel while addressing the German Parliament in July 2009 stated that "We are seeing that the world is growing together and that the problems that we face cannot be solved by the industrialised countries alone" (Smyth, 2009). Yet, the G-20 still excluded the other one hundred and seventy-two United Nations member states. In response to the limited Southern-representation at the G-20 Summit, the G-192 convened with full participation of all UN-member states. During a G-192 forum on the economic crisis, many Southern representatives attacked Western-based financial institutions, such as the International Monetary Fund and the World Bank, for maintaining the current system of uncontrolled deregulated free-market capitalism that has benefitted the North, much to the detriment of the South (The Real News). The rules of the current global economic order stipulated that the North would always win.

During the G-192 conference, Gaddafi, Chávez, and other leaders criticized the West and Western-led institutions, such as the United Nations for being unequal and not living up to its mandate as an organization where every nation has an equal voice. After achieving independence, many Southern nations pursued membership in these international organizations in order to secure and articulate their recently acquired sovereign status. Newly independent nations eagerly joined the World Bank, International Monetary Fund (IMF) and the United Nations. The latter especially as it officially offered equal status as provided by article 2 of the United Nations Charter—"The Organization is based on the sovereign equality of all its Members" (United Nations. Charter of the United Nations). While these states pursued a role within global institutions as a means of asserting their independence, many of the organizations have failed to live up to Southern expectations of inclusion and benefit. Within the economic sector, the IMF and the World Bank "policies towards the global south have been heavily criticized for their incongruity with the needs of the developing countries" while "the self-interest of the dominant powers has ensured that the UN has failed in its self-stated aim to assist the people of the world in times of crisis in the global south" (Weiss, T.G., 2008). In the post-colonial world, international institutions have largely failed to treat Northern and Southern states as equals.

Recognizing the need to change the rules of the game, the leaders at the G-192 conference agreed to deepen cooperation in energy, mining, finance, agriculture and other areas to bolster the economic and political clout of the regions. Considering the vast amount of natural resources and raw materials available in South America and Africa, Gaddafi believes that these two regions can become economically rich if they share resources and protect themselves from Northern exploitation (Márquez). According to the Venezuelan Energy Minister, speaking at the South America- Africa summit, the two regions combined have one quarter of the world's energy sources (Márquez). For Gaddafi and other Southern leaders, unity is the most powerful weapon the South has in combating Northern power and exploitation.

In addition to the first convening of the G-192, 2009 also represented the first BRIC Summit. Furthering the cause of Southern political and economic unity, this summit brought together four of the strongest economies of the developing world. Brazil, Russia, India and China (acronymed to BRIC) came together under the BRIC Summit in order to shift the existing geo-political order away from the West, and in favor of the East. It was created with the aim of challenging and ending Western domination, stands against the hegemony of the United States and NATO and is committed to making sure that no single nation will ever exclusively hold the reins of power (Al Jazeera).

While these are all current examples of Gaddafi's, and other Southern leaders,' desire to create parallel institutions for the South, these proposals for greater Southern unity are nothing new. The history of Southern organizations and cooperation dates back to the 1950s, yet the problem of political inequalities across nations still persist. These recent attempts at Southern cooperation highlighted above, may be no different than the failed attempts in the past, but the recurring desire of the South to tackle the problem of global inequalities makes it an issue worth examining.

1.2 Research Question

With this background in mind, I hope to understand under what conditions Southern collective action can successfully challenge the power of the North. Following a dependency approach to international relations, this thesis is predicated on the idea that there exists harmful inequalities between Northern and Southern states that need to be fixed.

This question of course relies on defining what is meant by "North" and "South." Using this definition I will be able to better reach my research aim of understanding the proper conditions in which global equity among nations can be achieved.

1.3 Competing Explanations of International Development

There is a great deal of literature explaining international development and North/South relations. Most of this research can be found within international relations and international political economy. Modernization theory is one of the first theories to emerge explaining international development. It was originally developed from sociological ways to try to explain the change from pre-industrial to industrial society, which was later adopted and applied to the debate of modernization within the Third World (Smith, B.C., 1996, p44). Modernization theory stipulates that societies can, and will become developed if they follow in the footsteps of their already developed, Western counterparts. The problem, as diagnosed by modernization scholars, was that Third World states were not "modern" and still stuck in traditional cultural patterns which stifled economic advancement (Dougherty, 1990, p251). The prescription for these "traditional" societies was to reform their economic, political, and most importantly, their cultural norms and values. Provided this occurs, development will ensue. Modernization theorists advocate a very specific path to development, one that mirrors the development followed by the industrial capitalist countries of the First World. According to modernization theory, the obstacles to development lay within these underdeveloped countries themselves. The internal

factors which stymy development, can be rectified by infusing differentiation, secularization and cultural modernization within these underdeveloped traditional societies (Smith, B.C., 1996, p44-47).

Differentiation rests on the idea that as societies progress toward modernity, social activities become more divided as institutions are established to perform very specialized and specific tasks. This is contrasted to the traditional society where the family unit is in charge of performing a multitude of tasks rather than having these tasks diffused among different, non-familial institutions and actors (Smith, B.C., 1996, p45). Secularization is concerned not necessarily with people losing their spirituality or religion, but learning how to differentiate between the spiritual and the temporal. Modernization can occur once traditional societies are able to understand the ability of man to affect change and that certain phenomenon occurs outside the realm of belief or religion. The last criteria for modernization theorists—cultural modernization—has to do with how people relate to each other within a society. In a traditional society, status and esteem are given to people automatically based on certain inherent criteria such as age or position, but in a modern society, status is something that is to be achieved, based on merit and not based on an inherent quality (Smith, B.C., 1996, p48). Another aspect of a modern social relation is the idea that people are interconnected in a variety of ways with a multitude of "single stranded relationships" (Smith, B.C.,1996, p39). This is contrasted to a traditional society where people perform only one or a very limited number of roles and are only known within the context of this one role. For modernization theorists there is a specific process from traditional to modern that societies must follow if they are to become developed. It is viewed as an evolutionary process with tradition at one end, and modernity at the other.

Dependency theory, on the other hand, emerged as a critique and an antithetical explanation to modernization theory. It emerged as a competing method of explaining development, or lack thereof, of the former colonies. It was, and is, a structural theory that maintains that it is not that the developing countries "lack capital and lag behind the rich because they lie outside or on the edge of the capitalist world but rather because they have been integrated into the international

class structure of the capitalist system" (Dougherty, 1990, p248). The relationship between the developed and developing world is not one of mutual gain and benefit, but one of exploitation and subordination. The Third World can never develop as long as there exists an antagonistic First World whose development is predicated on Third World underdevelopment. Dependency theorists reject the claims of modernization theory that successful development "can only result through an appropriate response to stimuli from exogenous sources according to the uniquely successful Western model, as if development and Westernization were identical processes" (Dougherty, 1990, p251). For dependency adherents, the blame of underdevelopment falls squarely on the shoulders of the capitalist, developed countries.

This thesis will develop from the claims of dependency theory, which will be further elaborated in the following chapters.

1.4 Research Aims and Objective

The aim of my research is to understand and explore viable methods for South-South cooperation to be achieved. The goal of this thesis is to examine the direction South-South cooperation should take to effectively challenge the primacy of the North. Determining the direction will be assessed using different theories relating to international cooperation, group theory and hegemonic stability theory. The conclusions will be based on testing two different hypotheses that were developed once preliminary research was conducted and consulted. The hypotheses are enumerated in Chapter 4 and are used to test two different directions in which South-South cooperation may proceed. This research is firmly placed within existing literature on North/South relations. The findings of this thesis will contribute to the field of international relations and international development.

1.5 Thesis Structure

Chapter 2 of this thesis begins by providing certain limits to my research by defining "North and South" in a particular way that is imperative to follow my line of argumentation and reasoning. These terms can undoubtedly be defined in a multitude of ways, but it is important to understand in which ways I have chosen to define and operationalize such fundamental and theoretically ambiguous terms. The third chapter chronicles the historic relations between North and South, with a section devoted to Johan Galtung's classification of the three stages of imperialism. This third chapter also looks at the differences between the North and South and how these differences have resulted in the unity of the North and the comparative, disunity of the South. Chapter 4 is dedicated to the theoretical framework of the thesis. The theories utilized describe international cooperation, methods to overcome collective action problems, and hegemonic stability theory. Chapter five defines my methodology and the epistemological underpinnings of this thesis. The sixth chapter is part one of the analysis. This section focuses on the ability of Southern organizations to overcome collective action problems, while chapter seven focuses on the ability of leadership to overcome collective action problems. The last section, chapter eight is the conclusion of the thesis which summarizes the thesis while also making an assessment as to which direction Southern collective action should proceed.

2 Definitions

2.1 Defining North-South: North-South Taxonomy

Although this paper aims to overcome power disparities among states and thus eliminate the dichotomy and antagonism between North and South, this paper works off of how the world is, and not how I would like it to be. It is for that reason that I still employ the problematic terms "North" and "South." Although I find the taxonomy unfortunate, I still find it relevant and applicable when describing the current international political order.

While it used to be fairly straightforward as to which countries fell into the categories of North/developed/First World and South/underdeveloped/Third World, it has increasingly become complicated in today's world of globalization and interconnectedness (Slater, 2004). Although the Third World has classically joined the Asian, African, Latin and South Americans countries—based primarily on economic development—these kinds of sweeping generalizations and groupings are becoming increasingly harder to justify. States located within the international system have organized themselves based on this dichotomy, with summits and organizations joining Southern actors, sometimes in direct opposition to Northern institutions. Yet it is difficult to determine exactly what qualifies a state as North/developed/First World or South/underdeveloped/Third World.

2.1.1 From "Third World" to "Global South"

The term "Third World" was first formulated and advanced in the 1950s by the French

economist Alfred Sauvy (Lewellen, 1995, p3). Sauvy applied the terminology to underdeveloped countries as he believed the position of developing countries to be comparable to that of the Third Estate (the common people) of the French Revolution. United in their lack of agency within the existing system, the analogy maintains that the only refuge afforded the developing countries was to destroy the system, as the Third Estate had done (Biel, 2000, p119). The projection and anticipation of destruction of the world system, considering the limited options of the Third World, thus "expressed the white world's fear that the mass movement in the South might do something similar [as the Third Estate had done]. The term expressed a real risk, and gradually came to be used by the oppressed themselves" (Biel, 2000, p119).

During the Cold War, the North referred most commonly to the "industrial market states of the OECD" while the South was the "non-Communist developing world" (Smith, 1977, p1). After the Cold War, when a tripartite division of the world could no longer be justified, a more benign(?) term came to replace the term "Third World": Global South. The nomenclatorial decrease of the world into two, rather than three parts, was formally institutionalized within the 1980 "Brandt Report on Survival and International Development." In an effort to bridge North-South differences and officially recognize global divisions, the head of the World Bank called for a meeting of both North and South experts to address the glaring global inequalities between the two groups (Center for Global Negotiations; Slater, 2004). The report officially established the division of the world into two opposing political camps: Global North vs. Global South. With the disappearance of the Second World following the end of the Cold War, it is hard to find scholars who will defend the term "Third World", but I agree with Lewellen (1995), and thus defend my use of the term. Because although misleading, "arbitrary and pejorative," "we may be stuck with [Third World] because it has gained a place in the common vocabulary of nations" (p6). And for this reason, I will still employ the term "Third World."

2.2 Categorical Distinctions

As already alluded, It is difficult to define which countries fit into which category. The name and number of categories is disputed–can we really only work with the dichotomy North and South? Are they mutually exclusive?–with more discerning categories proposed to better reflect the more nuanced position of states. Asian "newly industrialized countries" (NICs), "least developed," and "developing states" are just a few of the labels offered for a more precise division of Southern states. The changing and expanding categories points to the fact that the world may not be as simple as North and South. For instance, one point of dispute when fitting countries in the mutually exclusive dichotomy of North and South, has been the problem of China. China, especially under Mao Zedong, has played a prominent role in leading the South, yet whether China belongs at all in the category of Southern countries, is disputed. China's nuclear status is considered a compelling reason to exclude China from the South, but India and Pakistan's acquisition of nuclear capabilities did not spark similar debate, thus devaluing the nuclear argument of China's Northern and first world status. A more compelling argument to exclude China from the Global South is their membership within the United Nations Security Council. Although China does enjoy certain political and economic advantages relative to most Southern states, relative to the Northern states, China experiences the same economic underdevelopment and imperialism that unites Southern states (Braveboy-Wagner, 2009).

The confusion of which country fits where is further corroborated by the United Nation's ambiguous distinction between the two regions–"developed" and "developing,"

> *There is no established convention for the designation of "developed" and "developing" countries or areas in the United Nations system. In common practice, Japan in Asia, Canada and the United States in northern America, Australia and New Zealand in Oceania, and Europe are considered "developed" regions or areas. In international trade statistics, the Southern African Customs Union is also treated as a developed region and Israel as a developed country; countries emerging from*

Although it is difficult to pinpoint any exact discerning quality that unequivocally distinguishes Third World and Southern countries, common to all explanations of "Third World," consists of the African, Asian and Latin American countries who share a "history of underdevelopment and colonialism" (Braveboy-Wagner, 2009, p2). Additional to this distinction, I would agree with Christopher Clapham (1985), that it is certain states' "peripherality" that makes a state part of the Third World. According to Clapham, economic, cultural, social and political peripherality, in relation to the dominant industrial states of the developed world, is the defining feature of third world states (1985, p3). The Third World's structural subordination along the four dimensions delineated by Clapham provides the basis for the definitions in which this paper is premised. I will use Clapham's idea of peripherality to justify the distinction between the third world and the first world, between developing and developed states and between North and South. This idea of peripherality is further expanded below.

2.2.1 Galtung's Center-Periphery

Johan Galtung (1971) is credited with establishing the Center-Periphery model that Clapham, and I, utilize. According to Galtung, the world is comprised of Center and Periphery states, with each state having within it, its respective center and periphery societies. The centers in the Center have the most to gain from the current structure of the international system, the centers in the Periphery are next in line to reap the benefits, third in line are the peripheries in the Center, and in last place, are the peripheries in the Periphery. Galtung's aim in his Center-Periphery model is to liberate the periphery of the Peripheries against the oppressive domination of imperialism. Galtung's working definition of imperialism, is taken in a general sense and veers away from the

more traditional approach to imperialism as attached to a specific Empire (ie. Roman, British, American). Imperialism, for Galtung, is defined as "a dominance relation between collectivities, particularly between nations" (Galtung, 1971, p81). Galtung operationalizes his center-periphery model as a phenomenon occurring between two nations—one center exploiting one periphery. Within my own research problem, I believe this reasoning can be expanded to include the collective of center nations (formally the first world, now the Global North) and peripheral nations (formally the third world, now the Global South).

Throughout this paper I will use the dichotomies North/South, developed/underdeveloped, first world/third world interchangeably. I am aware of the loaded meanings in which these words carry, and the range of benignity attached to each, but I will choose the most appropriate word depending on the particular context. This is not to suggest that these words do not have different meanings, but particular words are more apt in different contexts. And while the words do indeed carry different connotations, all of them do reflect the basic model of center-periphery which defines political realities of North-South relations that Clapham and Galutng stipulate. It is for this reason that I feel justified to use these words interchangeably as they all, at their very basic, describe a particular problematic reality.

Understanding how I have chosen to define "North and South" is important, as the arguments made and conclusions reached in this thesis will be based on how I have chosen to define these terms.

3 Relations Between North and South

3.1 Historical Development of the North and South

The post war era (roughly between 1945 and 1970) witnessed the emancipation of about 75 percent of the world's population, who on the eve of World War II had been under the colonial control of western powers (Ramphal, 1979, p1). Scholars reacted to, and assessed decolonization in different terms. One way of interpreting post-war power configurations was through neocolonial or dependency literature. These two explanatory methods stipulated that "decolonization was only a flag-and-anthem ceremony masking the reality of the continued subordination of these areas to the West through economic ties whose force condemns them to the double fate of exploitation and stagnation" (Smith, 1977, p5). The purpose of dependency or neo-colonial theory is to understand current problems faced by the third world in relation to the past era of formal colonization. The economic and political stagnation, or even decline, faced by Southern countries, are direct byproducts of the exploitation by Western capitalism, so post-colonial theory goes. The West has unscrupulously used third world people and resources to build the current system of Northern haves and Southern have-nots. Neo-colonial scholar Franz Fanon opines that "This European opulence is literally scandalous, for it has been founded on slavery, and it comes directly from the soil and from the subsoil of the underdeveloped world" (Fanon, 1963, p53) According to Fanon and other neo-colonial and international political economic scholars, it is not simply that the South is underdeveloped, but that the developed world has consciously kept the third world down so that first world success is actually a result of third world underdevelopment. The capitalist system is predicated on the idea that for some to succeed, others must fail. In essence, a zero-sum game.

Post-colonial theory became a sort of rallying cry for third world scholars. A definitive ideology emerged to explain underdevelopment. In accordance with post-colonial theory, the opening statement of the Charter of Algiers—the founding document of the Group of 77—states: "The lot of more than a billion people of the developing world continues to deteriorate as a result of the trends in international economic relations" (First Ministerial Meeting of the Group of 77: Charter of Algiers). Although the terms of dependency put the South in a subordinate position vis-à-vis the North, having a common worldview provided the impetus for the South to think and act collectively. It was the formulation of "a common world view that made it possible to preserve unity in the face of diverse and shifting interests" and "allowed the political leaders of developing countries, and many of their subjects, to find a common identity that moved beyond seeing themselves as Moslems or Christians, Latins or Asians, neutrals or allies" (Krasner, 1985 p90). Dependency theory provided a common identity through, what Third World leaders and scholars considered, a shared fate of exploitation, bondage and servitude by the global North. Cleavages and differences between countries could be more easily ignored and commonalities exaggerated once dependency gave an identity that the Third World accepted. But even with a common identity, the Third World still represented over one hundred very disparate countries.

 After decolonization, while the former colonies were dealing with how to organize politically and get used to self-rule, the West, during this time, was able to consolidate political and economic power and stake out a position of primacy. The maintenance of their prime position was aided and confirmed by post-war political and economic international regimes initially created to revive Western Europe after the Second World War (Cohen). The Bretton Woods system which led to the formation of the World Bank and the International Monetary Fund (IMF), are two such examples of international institutions reinforcing Western economic primacy. Since their post-war inception, the head of the World Bank has always been an American, while the head of the IMF has always been a European, despite both organizations mandate to serve *global* interests (About the IMF; About the World Bank). Although both the IMF and the World Bank are officially neutral institutions serving the international economic interest, both institutions end up serving the interests of western countries through both formal and informal mechanisms. Within both

institutions, voting power of any given country is not determined democratically, such as by population, but by how much money that country has contributed to the institutions and by other political factors reflecting the degree of global political power wielded by that state (The Thistle). This type of voting structure obviously puts the powerful developed countries at a clear advantage over the least developed countries such as Sub-Saharan African countries, which are largely left out of decision making. As of 2008, the United States had the single largest vote in the IMF, with 17.08%, while the whole of Africa enjoyed a mere 5.5% of the vote (Weiss, M.A). In time, as the institutions of the Bretton Woods grew in importance and function, it became clear that the "Imperfections of the 'free market system' were manifest, and manifestly inimical to the interests of developing countries" (Ramphal, 1979, p44). The institutions that were set up to help the world, only proved beneficial to a certain select few countries.

Like the global financial institutions, the United Nations has also been accused of aiding western interests and has conversely, come under pressure to reform to better reflect the changes in the global balance of power. Advocates of UN reform have called on the Security Council to be broadened beyond the global nuclear powers—the US, Britain, China, France and Russia—and to offer African and Latin American countries permanent seats on the Security Council (Third World Network; AFP Europe). Although the UN Charter officially states that "The Organization is based on the principle of the sovereign equality of all its Members," many proponents of UN reform point to the five state makeup of the Security Council, who alone enjoy veto power, as proof to the contrary. According to political theorist Alex Callinicos (2008), the American projects of the UN, the Bretton Woods system and the

>*subsequent proliferation of other institutions--NATO, regional groupings such as the EU and the Asia-Pacific Economic Cooperation Forum (APEC) of which the US claims either patronage or membership, the G7, IMF, World Bank and the World Trade Organization--serve the common function of helping Washington to brigade together the leading capitalist states under its leadership"*

The North has managed to a very successful degree to utilize international institutions to serve their interest and consolidate power. This control of global institutions represents one way that Northern states have continued their primacy over the Third World.

3.1.1 Three Stages of Imperialism

According to Johan Galtung (1971), this domination of international organizations by the North represents the second of three stages of imperialism. The first stage, or Colonialism, is the form of imperialism that existed in the past, before decolonization. Under Colonialism there was direct, physical occupation of Periphery nations by the Center. Imperialism's current stage (or what was for Galtung at the time, current) is Neo-colonialism, where imperialism is articulated through international organizations. Under Neo-Colonialism, a more subtle, yet just as exploitative, form of domination, replaces the formal control of Colonialism. This kind of imperialism can be seen in the structure of many of the biggest and most prominent intergovernmental organizations (ie. The WTO, IMF, the UN) governing the political and economic international order. The last stage, and the stage of the future (Galutng's future, our present) is what Galtung calls Neo-neo-colonialism. This last stage of imperialism is based on international communication between centers in Center nations and centers in Periphery nations. Galtung calls this the stage of the "future," and at the time of writing, it was. Obviously in today's technological world of video-chats and telecommunication linking people in speeds unprecedented, either we are definitely in the third phase, or in a mixture of two and three. For Galtung, imperialism will continue along a trajectory of "decreasingly concrete (but increasingly effective?) ties between the two centers" where "the international organizations will not only go into disrepute, but dissolve. What will come in their place? *Instant communication*" (Galtung, 1970, p95). Although Galtung offers this new phase as seceding the second phase of international organizations, I believe we are currently experiencing a stage somewhere in between two and three. The most powerful international institutions still have their headquarters

based in Northern states, financed by the North and agendas controlled by Northern states and actors, and thus the imperialistic roles of international institutions have not completely been supplanted by the technological advances in communication that Galtung predicted. International institutions are projected to lose their utility for coordinated activities between Northern centers as they utilize new methods and the costs outweigh the benefits of physically attending conferences and summits (Braveboy-Wagner, 2005, p91). Heads of state still travel to international conferences and summits despite the advances in transportation, communication and technology. Rather than the direct colonization of Southern states, the North has been able to maintain their position of primacy through indirect, yet formally institutionalized methods of control through international organizations. The present form of imperialism is no more benign, just a bit trickier to observe.

3.2 Northern Unity and Southern Disunity

The North has managed, to a comparatively successful degree, to unify and coordinate policies much better than their Southern counterparts. Although the nomenclature of "North" is problematic and covers a wide variety of countries, with undoubtedly disparate concerns and backgrounds; the North does "have a high degree of tolerance of the differences among themselves. And they maintain formal and informal networks of contact that operate constantly and consciously to enlarge their areas of commonality" (Ramphal, 1979, p45). The developed countries have formally organized themselves through an array of economic and political institutions such as the European Economic Community, the European Free Trade Association, the Organization for Economic Co-operation and Development, the Organization for Security and Co-operation in Europe, the Nordic Council, the Trilateral Commission and the North Atlantic Treaty Organization, to name a few of the most well known. These organizations are well organized and have distinct international roles and responsibilities. The Southern countries have not experienced even close to the level of unity and coordination of the North. In neither the

Nonaligned Movement nor in the Group of 77–two of the larger and better organized Southern organizations–are there any fixed mechanisms for coordinated, long-term economic planning. Neither is there a permanent professional staff at either organization for establishing a negotiating strategy for the South (The Group of 77; Ramphal, 1979, p47). Southern organizations remain largely disorganized and lacking of a coherent strategy.

While there may be a definite lack of formal coordination within international organizations by the South, there are some informal channels that the South has pursued. The Third World Forum and academic productions at Southern universities have provided outlets for Southern thought and coordination, yet both of these resources only offer minimal recourse as they make a low impact into political decisions on North-South issues (Ramphal, 1979). Considering the lack of coordination mechanisms within formal and informal channels, the final result is that "the South is almost wholly unorganized in terms of negotiations with the North and even in terms of relations within the South" (Ramphal, 1979, p47). While it may be tempting to ask why the South has not been able to achieve the same level of unity as the North and dismiss it as a Southern defect, it cannot be ignored that the differences between developing states is far greater than those between developed states.

For instance, the United Nations has created categories based on countries' level of Human Development. It divides countries into "developed and developing countries," "least developed countries," "landlocked developing," "small island developing countries" and "transition countries" (United Nations. Standard Country and Area Codes Classifications (M49). These multitude of categories is a testament to the different orientations—geographical, economic and political—that may separate Southern countries. Provided the amount of disparities that may exist among Southern nations, it is not unlikely that Southern states may assume varying and disparate priorities, which thus, decrease chances of coordination. Yet while the goals and needs of each country may be quite different, they each need each other if their individual goals are to be met. According to Stephen Krasner (1985), the imperative for coordination becomes stronger when the power capabilities of individual Southern states are weak, as they currently are. The

Third World recognizes their inability to "rely on unilateral strategies" and their need "to band together to overcome individual weaknesses" to initiate change in the international political structure (Lake, 1987, p232). Yet despite recognizing the utility and benefit of collective action, the South has not been able to organize effectively and maintain a solid front against the North.

One fundamental problem faced by the South, (and by the North for that matter, but perhaps to a lesser extent), is that decisions are made at the national level and the interests of the South may not be in the interest of individual states—the location in which decisions are made. An example of national interests superseding collective interests can be seen in the reluctance of some Southern states to establish its own secretariat (Stewart, 1983). The stronger states of the South oppose the institution of a permanent secretariat out of fear that *their* financial resources and manpower will go to better represent the weaker Southern states at the expense of the stronger states (Stewart, 1983). While it may prove mutually beneficial to establish a permanent decision making body, the immediate national interests are paramount to what may be best for the collective. Talking about third world interest as a singular entity is problematic considering the varied and sometimes, contradictory interests of individual states and how the collective good may clash at times with national interests.

Also, when comparing the success of the North and the South to act collectively, the Prisoner's Dilemma paradox figures more prominently in the South than it does in the North. In any attempt at collective decision-making, a certain degree of the Prisoner's Dilemma figures, yet Southern states' individual weakness might exacerbate this problem. A classic Prisoner's Dilemma stipulates that two actors may not cooperate even though it may be in both of their best interests to do so. This outcome may occur if either of the two actors feels the other actor may defect and they themselves will lose. In the case of Southern cooperation, a type of Prisoner's Dilemma figures in, not in the classical sense that one defect equals the other's loss, but where "each country would gain if collective action were taken, but each would lose if they alone take action" (Stewart, 1983). In the case of Southern countries, the ramifications of renegade,

unilateral action against the North can be punished by the much stronger and better organized North.

Results can be equally disastrous if the South does not have full support of all Southern states in its attempts to instigate subversive action against the North. The closing of the coffee bean cartel, the Association of Coffee Producing Countries, in 2001 provides an example of this. The cartel consisted of fourteen coffee producing countries from South America, Africa and Asia, whose production accounted for about 70% of global coffee supply (British Broadcasting Company). The success of the cartel rested on member state's compliance to stay within the allotted production levels in order to control international coffee prices, similar to the Organization of the Petroleum Exporting Countries (OPEC). Certain coffee producing countries that stayed out of the cartel, namely Vietnam, expanded their coffee production bringing global production levels higher than demand and thus, bringing down the international price for coffee. In response, countries within the cartel defected on their quota levels in order to compete with the non-cartel coffee producing countries (BBC). The cartel was thus destroyed as the actions by non-cartel countries made it impossible, or at least highly disadvantageous, to remain within the cartel. The fragility of Southern states, or even a group of Southern states, requires that the South act in concert. When the individual impact of Southern states in rivaling the North is so low, it is imperative that the states coordinate efforts, or face the consequences.

Yet despite the precarious nature of collective Southern action, this is not to suggest that the South has no agency whatsoever. Past successes, especially in the form of regional economic cooperation and organizations such as the Asian Association for Regional Cooperation, the African Union, the Andean Community and the League of Arab States, just to name a few, are all examples of regional organizations that have made great headway in the area of economic self-help and coordination. Although there most certainly are instances of cooperation and coordination, they remain largely isolated against the bigger backdrop of powerlessness. Southern states, even within specific issue areas, "rarely have the national power capabilities to bargain effectively with the more industrialized states" (Krasner, 1985, p36). The present

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relative bargaining position of the South is weak as their general power capabilities – as of now – cannot rival the North's; but this does not mean it could never happen.

Considering the degree of Western control of global institutions, the South should be interested in challenging the power and primacy of the West. One of the ways of accomplishing this aim is through collective action. States (even powerful ones) will be interested in organizing collectively, and thus forfeiting some of their sovereignty, because the benefits of coordinated action, such as the increased efficiency provided by coordinated action outweigh the costs. According to Keisuke Iida (1988), diplomats in the Third World are acutely aware of this fact and feel their position is much stronger when negotiating on behalf of all of the least developed countries rather than for a few, or for one (Iida, 1988, p379). Therefore it is contingent for Southern states to establish a unified strategy and position in which to engage with the more unified North. Collective action will allow states of the Global South to form a singular collective identity based on common backgrounds and goals, and to utilize this identity to form a united front against the more powerful and well organized Western states. But considering the diversity of states and issues, can the Third World overcome collective action problems and successfully challenge Northern primacy? The answer to this question will be will be considered in the following sections.

4 Theoretical Framework

Achieving cooperation is not an easy task in global politics. The anarchic − or lack of a central global government or governing system − state of the current world makes cooperation difficult. Cheating and defection litter the history of attempts at international cooperation, as a government to enforce rules, or punish defectors is lacking (Axelrod, 1985, p1). Within international politics there can be great incentive to defect or to free-ride, and thus international cooperation becomes a matter of how to overcome these collective-action games. Yet despite the challenges and obstacles to international cooperation, cooperation does indeed, occur.

4.1 Olson's "Logic of Collective Action"

One reason that international collective action is difficult to achieve is because with any group, whether of states or individuals, it is rarely the case that what is in the interest of all, is in the interest of each individual. This incongruence with individual and group logic, makes cooperation difficult, and at times, impossible. According to Mancur Olson (1971), the author of *The Logic of Collective Action: Public Goods and the Theory of Groups*, self-interested behaviour renders cooperative behaviour impossible when the rationality for collective action is in contradiction with individual rationality. Individual members of a group are expected to cooperate if the members have a common objective and if they accept that they would be better off if they achieved their common objective. It seems to follow basic logic that individuals, provided they are rational and self-interested, would act to achieve a mutually beneficial goal (Olson, 1971, p1). But Olson states that the above logic is *not* true: "If the members of a large group rationally seek to maximize their personal welfare, they will *not* act to advance their common or group objectives unless there is coercion to force them to do so" (Olson, 1971, p2).

Olson's logic debunked the belief that actors will be motivated to act collectively; only on the basis that everyone in the group has interests in common. It is taken for granted that groups will work toward a common goal if it is known that each member of the group has an interest in achieving a common goal or outcome. Olson maintains that if groups cannot provide the proper incentives to cooperate, or the proper disincentives to defect, individuals will be unmotivated to act collectively, no matter if the group is in complete agreement about the common good and the correct method of achieving it (Olson, 1971, p2). Within the social sciences it is usually assumed that groups will act in their self-interest because individuals do. But Olson maintains that you cannot apply individual logic to group logic and that cooperation will not ensue simply because it is in the interest of all to cooperate. This is due to the fact that there is insufficient "coercion," or motivation to cooperate. This logic, however, does not necessarily apply to small groups. In smaller groups, individuals members will have more per-capita gains from collective action than larger groups. The decreased payoff of collective action as groups get bigger, may increase the disincentives for individuals of larger groups to act collectively (Olsen, 1971). When applying Olson's logic to political cooperation, the state of anarchy complicates political cooperation as there lacks an inherent or taken-for-granted provider of incentives and disincentives. States are not willing to adjust their behaviour when it cannot be guaranteed that all group members, especially those of large ones, will make equal, sufficient adjustments. In order for collective action to work in the international political environment, it is up for states to create proper regimes and institutions to facilitate collective action and eliminate the incentive to free-ride or defect. Yoshimatsu (2006) provides two ways in which to accomplish the elimination of free-riding and defection within international cooperation.

4.2 Explaining International Cooperation

According to Hidetaka Yoshimatsu (2006), there are two kinds of collective action problems when it comes to promoting international cooperation: collaboration games and coordination games. The classic collaboration game is best articulated through the prisoner's dilemma, as

mentioned briefly in Chapter 3. In the prisoner's dilemma two prisoners are given a choice to either defect, or cooperate with each other. For instance, two people have recently been charged with the same crime. Neither prisoner has admitted guilt nor innocence. To figure out who did what and determine guilt or innocence, a police officer offers both prisoners the possibility to incriminate the other prisoner for the crime and thus get themselves off the hook (one defects), but if and only if, the other prisoner remains quiet (one cooperates). If both of the prisoners decide to implicate the other (both defect), then both prisoners will get the maximum sentence for the crime. If both prisoners remain quite (both cooperate), they will both get punished, but both will receive a lesser sentence than they would if neither speaks. The prisoner's dilemma assumes that each actor is rational and even though cooperation is not the optimum decision for the individual actor, defection, or the pursuit of self-interest, will result in a far worst position than cooperation. In this situation the optimum action for either actor is *not* the equilibrium decision (Prisoner's Dilemma). Following this line of thinking, "the resolution of the collaboration game requires the actors to move away from sub-optimal equilibirium by abstaining from the pursuit of narrow self-interests" (Yoshimatsu, 2006, p117). Just as in the prisoner's dilemma, actors in a group may have to act contrary to their rational self-interest by cooperating, rather than pursuing rational self-interest and end up in a worse situation. For this reason, collaboration problems often impede interstate decisions since the optimal group decision is rarely what is in the rational best-interest of each invested actor. States have incentives to defect in order to achieve individual short-term benefits.

The second collective action game–coordination game–is when actors desire to work together but have different desires for the outcome of their collaboration. In this situation coordination will have a higher payoff than not working together, but figuring out in which way to work is the complicated issue. One example of a coordination game would be if two people want to split a pizza, since neither has enough to buy a whole pizza. They can only afford to buy one pizza with one topping, but each wants a different topping. The choice they make maters since one person gets a higher payoff and gets their desires fulfilled. Both actors are motivated to work collaboratively since nether have enough money for a whole pizza, but unlike the cooperation

game, the problem in a coordination game is "not to avoid the temptation to defect, but to decide on which of the two equilibrium points will be chosen" (Yoshimatsu, 2006, p118). Within international relations, coordination games are faced when states have decided they need to address a specific issue, but have differing ideas on the policies to adopt to achieve the best results. For example, environmental issues are best addressed at the international level and require a great deal of international coordination, but how best to achieve goals of environmental protection will vary. When looking at Southern collective action, both collaboration and coordination games can be discerned.

To overcome these games (collaboration and coordination) and avoid collective action problems, there are two methods: establish international institutions and leadership (Yoshimatsu, 2006, p118-119). The type of organization required depends on which type of collection action problem needs to be addressed. In the case of a collaboration game, a formal centralized organization is required. A formal organization with strict enforcement mechanisms must be in place in order to curtail defection since cooperation will not necessarily be the most advantageous for each party in the short-term. Addressing coordination games on the other hand, does not necessarily require a centralized formal organization with strong enforcement and monitoring mechanisms (Yoshimatsu, 2006, p119). Since there is no fear of state's defecting since it works in the self-interest of the state to work collaboratively.

The second method of overcoming collective action problems–leadership–is an option when dealing with both coordination and collaboration games. In the case of collaboration games "the existence of a hegemonic state with preponderant material resources can facilitate the resolution of collaboration games" (Yoshimatsu, 2006, p119). This theory is more commonly known as "hegemonic stability theory" and has been used to explain international economic development in the late nineteenth century under British leadership and explain the international power configurations after World War II under the leadership of the United Sates (Webb, 1989, p1). The hegemonic state provides an international order that advances its own interests, but the resulting cooperation may also work in the interest of the other states as well. Hegemonic

stability theory will be further elaborated in the following section, specifically how it relates to international cooperation.

4.3 Hegemonic Stability Theory

According to Maxi Schoeman (2007), "Hegemony refers to leadership or primacy in an international system and a hegemon is a state that possesses sufficient capability to fulfill such a leadership role" (Schoeman, 2007, p2). There are certain basic tenants to hegemonic stability theory. The first is the existence of striking power asymmetries between the hegemon and the other states in the cooperative agreement. These asymmetries can be articulated through a variety of ways, perhaps politically, economically or militarily, but what must hold true is that the hegemon enjoys a size advantage in one or more ways relative to other states in a potential cooperative agreement (Alt, 1988, p447). Also, in hegemonic stability theory, as in any asymmetric relationship, there will inevitably be conflict on how the "rewards" of cooperation will be distributed. Depending on whether the leadership of the hegemon is "coercive" or "benevolent" will determine how rewards and benefits are distributed among cooperating actors. The leadership style a hegemon pursues is important to consider, especially when accessing the benevolence or malevolence of the theory itself. Inherent to hegemonic stability theory is the existence of a comparatively "bigger" actor and a group of small actors. Under coercive leadership, the big actor seems to get the better end of the deal as they receive the bulk of the benefits, the benevolent strand exists when the smaller actors benefit more than the big actor since they bear none of the costs of provision but still enjoy the benefits of cooperation (Snidal, 1985, p581). According to Alt et. al (1988), there exists a continuum based on how benefits are distributed between the hegemon and the other cooperating states. At one end falls *empire* where benefits are distributed heavily in favor of the hegemon. The smaller states would receive just enough benefits to quell resistance or rebellion, while the hegemon would enjoy the remainder of the benefits. At the opposite end of the continuum lies what Alt et al. terms an *alliance*. Under an alliance the smaller countries receive most of the benefits, while the hegemon does not receive

more benefits than it would if no cooperative agreement existed in the first place (Alt, 1988, p447). Of course both of these conditions–empire and alliance–are extremes of a continuum and thus most real world cases of cooperative lie somewhere in between the two. The larger state will naturally want to maximize the contribution of the smaller states. It is the larger states relative power capabilities that will determine where the cooperation falls on the continuum and how much of the benefits the larger state receives relative to the smaller states. If smaller states do receive net benefits from cooperative agreements, then the smaller states will be more accepting of hegemonic leadership and accept its legitimacy.

The two methods to overcome collective action problems, as proposed by Yoshimatsu—institutions and leadership—are applied to collective action problems in the Third World and analyzed later, in Chapters 6 and 7.

5 Methodology

This thesis is strictly qualitative. The decision to conduct qualitative research is based on the nature of the research question as the research question would be quite challenging to convey using quantitative methods (Strauss, 1990 p19).

5.1 Epistemological Standpoint

The emancipatory aim of my thesis is my motivation for working within the critical theory tradition. In his essay "Traditional and Critical Theory (1937)," leading critical theorist Max Horkheimer maintains that a critical theory must not only explain reality but also be interested in its transformation. A critical theory "must explain what is wrong with current social reality, identify the actors to change it, and provide both clear norms for criticism and achievable practical goals for social transformation" (Bohman, 2005). In critical theory, the capacity to initiate transformation is fully granted to human individuals. The theoretician is not simply a passive actor reflecting on reality, but plays an active role in instigating change. If "the theoretician and his specific object are seen as forming a dynamic unity with the oppressed class, so that his presentation of societal contradictions is not merely an expression of the concrete historical situation but also a force within it to stimulate change, then his real function emerges" (Horkheimer, 1937, p215). The knowledge produced by the critical theoretician provides the intellectual impetus for change. It is only if a theory fulfils the above requirements–explanatory, reflective of social reality and transformative–can research be considered "critical." And unlike realism and liberalism within international relations theory, critical theory is a more inclusive approach that provides room for marginalized states, rather than only focussing on the powerful

states that dominate the current international system. Critical theorists are concerned with not simply presenting the world as it is (ie. "traditional theory"), but focussing on how the world should be by recognizing the power of human agency to initiate change. For this reason critical theorists view the main international institutions as "reflecting hegemonic interests but are able to comfortably incorporate the rising role of 'counter hegemonic' transnational movements" (Braveboy-Wagner, 2009). The main subjects of this paper are the marginalized, developing states, as they are the agents in charge of these counter hegemonic transnational movements, rather than the powerful states that a positivist account (ie. realist or liberalist approach) would likely focus.

5.2 Methods and Research Design: Normative Case Study

The nature of my research question and research aim lends itself well to a normative case study. Case studies are generally used when a researcher is concerned with "why" or "how" questions, "when the investigator has little control over events, and when the focus is on a contemporary phenomenon within some real-life context" (Yin, 2003, p1). The normative dimension to the case study is concerned with not only how things are, but also how they should be. It has already been stated that my aim is to create a more egalitarian world order, with power disparities among states eliminated. The case study as a method is appropriate for my study as it allows the researcher "to retain the holistic and meaningful characteristics of real-life events" (Yin, 2003, p2). For my thesis I will be dealing with South-South cooperation within the current and historical context of international relations. According to John Gerring, a "*case* connotes a spatially delimited phenomenon (a unit) observed at a single point in time or over some period of time" and can be "created out of any phenomenon so long as it had identifiable boundaries and comprised the primary object of an inference" (Gerring, 2007, p19). I have identified South-South cooperation as my "case" as it fits Gerring's criteria and represents the object of inquiry. My study will be partly descriptive as I elaborate on particular instances of South-South cooperation, but the overall objective of the case-study will be normative as I will utilize theory

to understand which direction South-South cooperation should take if it is to eliminate collective action problems.

My thesis is theoretically based, and utilizes existing literature to substantiate its findings. Theory within a case-study can be used in a multitude of ways. My study follows a theory-before-research model as my theory will be used to understand what to explore and the direction in which the study will proceed (Berg, 2007, p285). I followed a linear process of research as I first started the research process within existing literature. Once developing a topic in which to focus my research, I located all available relevant literature on North/South relations, which led me to literature on international cooperation. From these starting points I was able to derive hypotheses that I operationalized using empirical conditions and examples provided from previous literature (Flick, 2006, p98). The theoretical starting point—Yoshimatsu's (2006) two methods of overcoming collective action problems in international cooperation—led to the derivation of particular hypotheses about these two methods. The hypotheses were generated using theories pertaining to group theory as well as leadership theories, in accordance with Yoshimatsu's proposed two methods. After reading the existing literature on these subjects, the hypotheses were developed as such:

Hypothesis 1: groups that are smaller and more homogenous will be more effective to reach group goals
Hypothesis 2: China could provide necessary leadership for the global South

These hypotheses were gathered after initial theoretical literature was consulted, but prior to gathering data from the "field," so to speak. The analysis will thus be broken into two parts. The first part will deal with the first hypothesis, and will relate to Yoshimatsu's first method—leadership, while the second part I will test Yoshimatsu's theory and expand on it as it applies to Southern collective action. According to Uwe Flick, a case study can either focus on "a single observation or multiple (within-case) observation" (Flick, 2006, p19). This study will have multiple within-case observations as I will explore different dimensions of South-South

collective action and cooperation. Although this thesis is meant to look specifically at the case of South-South collective action, its ability to be generalizable to other international actors and states should not be discounted. With case studies, and with qualitative research in general, generalizability, is a measure of research validity that needs to be considered and assessed. The results of my research are meant to be indicative of the particular units of analysis, epistemological background and definitions I have chosen to employ. Yet this is not to say that the findings cannot be extended to other areas of international collective action.

The analytical framework of the thesis is developed from theories pertaining to group–theory and to hegemonic stability theory. I will use a variety of theories to analyze and understand the case being investigated. Theory plays a big role in my thesis as the design and analysis of the thesis will be based in previous literature and various theories relating to my topic. Following with the design of qualitative research, this thesis will be guided by different theories and does not aim to test a theory necessarily, but to apply particular theories as they pertain and contribute to the aim of my research.

5.3 Materials

The materials used for analysis will be existing literature on the topic of inquiry—newspaper and journal articles, and official documents from the different international organizations detailed in the analysis part of the thesis. The choices in materials used were based on their appropriateness and relevance to my topic. Obviously, the full extent of materials on the subject could have not been included and particular materials were preferred to others based on their relevance and propriety when considering my research aim.

5.4 Limitations

Inherent in any qualitative research is the "problem" of the researcher. The role of the researcher is quite important as it affects the way that the data is produced, used and interpreted within the

research. The nature of qualitative research makes the data, usually words or images, open to the subjective interpretation of the researcher. According to Uwe Flick (2006), "Despite all the methodological controls, influences from interests, social and cultural backgrounds are difficult to avoid in research" as "these factors influence the formation of research questions and hypothesis as well as interpretation of data and relations" (Flick, p14). Yet, rather than writing qualitative research as unscientific and unreliable, as positivists, would like you to believe, there are ways of overcoming the involvement of the particular researcher. A researcher can either acknowledge and explicitly states from the beginning their background and personal experiences that may affect the research, or the researcher can understand the significant role the individual researcher plays, yet can commit to trying to distance themselves from the research and try to remain as objective as possible (Denscombe, 2003, p268-269). My own approach for overcoming the role of the researcher will be more in line with the first option. I will try to remain as neutral and objective as possible while still acknowledging that perfect objectivity is impossible. As mentioned previously in the paper, I do adhere to a dependency interpretation of international relations and thus this paper works off the premises of dependency. Also, as the motivation for this thesis is social transformation, I cannot state that I am neutral as a researcher. The materials were interpreted with as much objectivity as possible, but of course the choice of materials and resulting analysis were motivated by my research aim.

The prominent role of the researcher also begs the question: is the research reliable? When assessing reliability within research, the classic measurement is whether the results or conclusions would be reached if another researcher were to conduct the same research. Qualitative research in general may be difficult to replicate but if the methods, processes and definitions used by the researcher are explicitly delineated, the research results should match the research question.

6 Analysis-Institutions

Considering the historical relationship between the Global North and the Global South, and the current power capabilities of individual Southern states, I maintain that Southern countries will be motivated to act collectively to challenge Western primacy. This section will focus on the two methods of overcoming collective action problems, whether dealing with coordination or cooperation games, that Yoshimatsu puts forth—international institutions and leadership. Both of these methods will not be looked at generally, but in the particular ways that I find most convincing and beneficial to the South considering current and potential realities. The first section will look at how international institutions should be constructed based on the historical successes of Southern international institutions in order to overcome collective action problems. The second section will focus on leadership within the Global South, particularly the potential hegemonic leadership provided by China, as an alternative method to overcoming collective action problems.

6.1 Resolving Collective-Action Problems Method #1: Institutions

One of the ways of achieving coordination and cooperation is through international organizations (IOs). In the case of Southern states, where the impact of unilateral action may be minimal, IOs allow them to pool their resources and provides forums for less powerful states of the world to aggregate and build coalitions against stronger states (Braveboy-Wagner, 2009, p5-6). From looking at past successes of Southern organizations, we can discern certain elements that made collective action possible within these organizations. The fist attempts of Southern collective action sought to work outside existing international organizations as they set up their own

organizations, while later attempts at Southern organizations tried to work within existing global organizations.

Third World states were able to work in tandem based on a shared commitment to dependency theory and a shared antipathy for the big-powers. In this section I want to trace the historical developments of Southern cooperation. I will provide a general introduction to these organizations, and access the success or failures of each organization and what can be learned from each attempt. The headings will inform the reader which organizations comprise a "tricontintental" orientation, or those that are made up of Asian, African and Latin American countries, and which comprise a "regional" orientation, or those whose members come from either entirely, or primarily, one specific geographical region. The successes of each organizational type–either tricontinental or regional–will be accessed in order to determine the most viable institutional arrangement for future successful collective action by the South.

6.1.1 Tricontintentalism: Working Outside the System-Bandung and NAM

Initial third world organizations relied on support and membership from all third world regions—Asia, Africa and Latin America. The first attempts at Southern unity can be traced back to the 1955 conference among Asian and African nations in Bandung, Indonesia, known better as the Bangung Conference. The purpose of this historic meeting was to unite the Asian and African countries against the informal mechanisms of colonialism that still beset these supposedly "post-colonial" states. In the opening statements of the Bandung Conference, its founder, Indonesian president Sukarno warned against only defining "colonialism" in its most direct, obvious way and warned the audience that "Colonialism has also its modern dress, in the form of economic control, intellectual control, actual physical control by a small but alien community within a nation. It is a skillful and determined enemy, and it appears in many guises" (Sukarno). This conference represented the first attempt at Southern nations coming together in the postcolonial era and set the stage for any collective Southern action that was to follow. It also marked the first time that former colonies met together without the presence of any of the

European powers, and thus was a clear assertion of their independence (Willetts, 1978, p3). The importance of this meeting is underscored by the fact that at the time "the international system was characterized by stronger vertical (top-down) relations between colony and metropole, and little interaction among colonies, especially colonies of different metropoles" (Braveboy-Wagner, 2009, p14). Before Bandung, the peripheral states' relationships to other states was largely that between its Center, with minimal contact to other peripheral states. The ten points developed at the 1955 conference was to provide the foundational principles to which future Southern solidarity would be based. Respect for national sovereignty, abstention from alliances that would serve the interests of the major international powers and to promote the mutual interests and cooperation among member states became the cornerstone for Southern collective action (Khudori, 2006). Although the Conference was groundbreaking in its ability to assemble third world states, it is now largely accessed as "long on rhetoric and short on specific outcomes" (Braveboy-Wagner, 2009, p14). The ten principles were established, yet how they were to be achieved and how they would affect future behavior was something left for future initiative.

After plans for a second Bandung conference, to be held in Algiers in 1965, fell through due to political divisions over the meaning and importance of non-alignment with major power, a few third world leaders came together to create the Non-Aligned Movement (NAM). Yugoslavia's Josip Tito, India's Jawaharlal Nehru and Egypt's Gamal Nasser developed the biggest third world organization based on the principle of non-alignment in Belgrade in 1961, overshadowing the 1955 conference in number of member countries and its outcomes (Willetts, 1978). Unlike Bandung, NAM was extended to any country that had an "espousal of a policy of peaceful coexistence of states with differing political and social systems and nonalignment or a trend in favor of such a policy; consistent support for movements of national independence" and noninvolvement in military alliances that were formed in consideration of Cold-War, Big Power (Braveboy-Wagner, 2009, p15). The original twenty-five NAM member states of 1961 grew into the one hundred and eighteen members by the year 2009 (BBC. Profile: Non-Aligned Movement).

Since the end of the Cold War, NAM has tried to reconstitute itself to better reflect global realities, considering the main impetus for its inception–East/West tensions–has disappeared. Now the NAM has focused its agenda on concerns about globalization, trade and investment, debt, AIDS and international crime (BBC. Profile: Non-Aligned Movement). Yet the diverse opinions and political orientations and internal disputes have made coming up with a conclusive direction in which to go after the Cold War has been a major obstacle for consensus-building. While the NAM's members fervently believe that NAM still has relevance in a post-Cold War world, its critics are doubtful. Speaking to Al-Jazeera television on July 15th, just days ahead of Egypt's hosting of the 15th NAM summit, senior professor of US foreign policy at the University of London's Institute for the Study of the Americas, Timothy Lynch, calls the NAM a "moribund" organization and claims its outdated Anti-American stance is the "only thing that gives it coherence" (Al-Jazeera, Inside Story). This view is corroborated by Kirk Bowman, a specialist on Latin America at the Georgia Institute of Technology who notes that NAM "stands against a lot of things but has few positive alternatives to offer" and that its "members are so diverse that they don't share much in common, aside from a temporary hostility to U.S. policy" (Bransten, 2006). While the NAM is numerically very strong with 118 member states and 15 observer states, it is politically and economically weak compared to the better organized developed states. Within NAM there does not exist a central development or economic plan to unite these countries. There is currently no constitution, no permanent secretariat and not enough resources to put forth a common international agenda. Also, the political connections are extremely weak among NAM states as they lack a *"*mechanism for dismantling inner tension between member states and [have] no military common capacity to give solidarity to the movement" (Caragea, 2009). Due to the lack of tangible goals and the questioned relevancy of the NAM, the NAM of the past or of the present, may not exist as an organization capable of effectively overcoming collective action problems. The tricontinental orientation of the Bandung Conference and the NAM make it difficult for these organizations to establish a coherent and effective strategy to accomplish anything tangible, or at all threatening to Northern supremacy.

6.1.2 Tricontintentalism: Working Inside the System-G77 and NIEO

The more confrontational approach of the Bandung Conference and the NAM, was replaced by a strategy of accommodation as third-world countries tried to work within existing international forums, such as the United Nations. After convincing the developed countries that their economic fate relied on a functioning and healthy third world, a group of southern countries came together to bring about the first United Nations Conference on Trade and Development (UNCTAD) in 1964 (Braveboy-Wagner, 2009, p31). The UNCTAD was established as a permanent intergovernmental body and is the main unit of the United Nations General Assembly to handle trade, investment and development issues. At the end of the first session of the UNCTAD, seventy seven developing states signed the "Joint Declaration of the Seventy-Seven Countries" bringing the Group of 77 into existence. The more political orientation of the NAM left a hole for economic development and cooperation among developing nations that was filled by the Group of 77. The objective of the G-77 is to promote the collective economic interests of its members and provide a forum in which member-states can articulate their goals and enhance their negotiating leverage (The Group of 77). According to the Group of 77 website, the aim of the G-77 is to provide "the means for all countries of the South to articulate and promote their collective economic interests and enhance their joint negotiating capacity on all major international economic issues within the United Nations system, and promote South-South cooperation for development" (The Group of 77). Upon establishing that trade problems existed throughout the developing world, the G-77 agenda focused most specifically on three areas—stabilization of commodity prices, increased market access and assistance of the industrial efforts of developing countries, and sufficient financing related to trade (Braveboy-Wagner, 2009, p33). The recommendations and ideas put forth by the G-77 as means to rectifying their inferior economic status, vis-à-vis the developed world, combined a mixture of concessions by the developed countries and initiatives by the developing countries. While the G-77 can of course be lauded for its commitment to South-South cooperation, like the NAM, it is also criticized for being disjointed and lacking a cohesive policy. The vast amount of countries represented by the G-77 has "resulted in comprehensive plans that are difficult to achieve in reality" and since the

developing countries "divide into groups with different goals, it has sometimes been difficult to ensure solidarity and develop common negotiating strategies" Braveboy-Wagner, 2009, p52). G-77 has brought Southern countries together, but it falls a bit short on producing a unified negotiating strategy that can be successfully utilized against the North.

The most comprehensive articulation of southern economic interests was articulated by the calls within the UNCTAD for a New International Economic Order, or NIEO, in 1974. Emboldened by the success of OPEC in raising oil prices, developing countries were determined to fix the whole international economic structure in their favor. Mixing the demands of the G77 and the nonaligned, the developing world came to the realization that "attempts to restructure the international economic order within the traditional framework of North-South dialogue would be neither feasible nor beneficial" (Reddy, 1991, p25). Relying on the conventional framework developed by the G-77, the demands of the NIEO relied on southern action as well as northern concessions. The NIEO called for technology transfers from North to South, debt relief, development assistance and more representation and control for third world states on the boards of the World Bank and the IMF (Sneyd) Although at the time, international relations and international political economy scholars claimed the NIEO as the beginning of a new era for the developing world, most of the demands of the NIEO never came to fruition. The North was uninterested and unmotivated to make any concessions to the South as many of the industrial countries viewed the demands as unrealistic and counter to Northern interests. The NIEO was based on the idea that the developed states should be interested in helping the developing states grow economically, and should bear some of the burden of developing poorer nations (Blanco). Unfortunately for the developing world, the developed world did not feel this responsibility to help. For this reason and "in part because of the golden rule—those who have the gold make the rules," the NIEO largely failed (Blanco).

While the demands of the NIEO never came to fruition, it was still an attempt by the South to achieve international cooperation. The NIEO represented one of the first instances of Southern states coming together to redefine the terms of international trade. The demands of the NIEO

called for a more balanced, more authoritative, less market-driven terms of trade, and provided an articulation of Southern economic frustrations. The tricontinetal orientation of the Southern organizations mentioned above, whether created wholly by Southern inception or within existing international organizations, made it difficult for collective action problems to be overcome, and for tangible results to be produced.

6.2 Regionalism: OAPEC

Contrasting the tricontinental organizations mentioned in the previous section, regional organizations are the topic and focus of this section. Both complicating and enriching the international political landscape, regionalism and regional integration, is one of the most dynamic international political phenomenon. The European Union may be the most well known and integrated example of regionalism, but regions of the global South have also developed organizations for coordinated action such as The Organization of American States (although the US is a member, it "still bears a Latin American stamp"), the African Union and The League of Arab States (Braveboy-Wagner: 2009 p64). In her article "The Carribean's Wider World: Re-thinking Global South Institutionalism," Jacqueline Anne Braveboy-Wagner states that "regional institutions, in particular integration arrangement, have seen a revival and deepening in response to the demands of globalization" (89).

The attempts at trilateralism mentioned previously have their merits as meeting places for third world states, yet critiques of all the organizations mention include lack of tangible results. Although the Bandung Conference, the NAM and the Group of 77 can be lauded for their ability to bring disparate third world countries together, other Third World organizations have been better at accomplishing tangible goals and providing a more legitimate confrontation to the West. Most striking may be the case of the 1973 oil embargo carried out by the Arab states of the Organization of Petroleum Exporting Countries (OAPEC). The next section will look at the oil embargos of 1967 and 1973, carried out by OPEC and AOPEC, respectively. It is my intention to understand, and draw conclusions as to why the former failed and the latter largely, succeeded.

6.2.1 OPEC Failed Oil Embargo of 1967

In September 1960, Iran, Iraq, Kuwait, Saudi Arabia and Venezuela came together at the Baghdad Conference to create the Organization of the Petroleum Exporting Countries (OPEC). The union of these five states was eventually extended to the twelve-states that currently comprise the organization. According to OPEC's website, the purpose of the cartel is to "co-ordinate and unify petroleum policies among Member Countries, in order to secure fair and stable prices for petroleum producers"(Our Mission). OPEC existed as an economic cooperation between member states, but some states wanted to make it a political organization as well.

After Egypt's humiliating defeat against Israel in the 1967 Six Day's War, the Arab oil states of OPEC tried to use oil as a political leverage against Israel and the Western states that supported Israel. The Arab states of OPEC wanted to punish Western nations for supporting Israel and thus enacted an oil embargo intended to (1) deter Western nations from giving military support to Israel in its fights against the Arab world, and (2) to punish those states that actively aided Israel by supplying arms and ammunition (Daoudi, 1984, p67). Unfortunately, the 1967 embargo did not leave much of a negative impression on Western economies and did not provide OPEC or the third world, the leverage it had hoped. Its failure was due to a number of internal and external factors. The most prominent internal factors rested on the fact that there was no unified Arab policy, and that there were too many cleavages among the OPEC members, both Arab and non-Arab states alike. Within the Arab states there were those that fell within the so-called "moderate and conservative" camp that had market economies with closer ties to the West, and on the other side were the "revolutionary" countries that had planned economies and strained relations with the West (Maachou,1982, p89). While Arab states wanted to give OPEC a political dimension, choosing what policy to follow was more difficult to determine. These differences among the Arab states made it difficult to come up with a unified policy in 1967.

The outbreak of conflict with Israel and several Arab states in the Six Day's War put severe pressure on the Arab world to support the embargo. While the Arab states publicly supported the

embargo, many states secretly questioned the embargo's purpose, targets, duration, effectiveness and justification (Daoudi, 1984, p.81). Also, the fact that there existed alternative energy sources from the non-Arab OPEC states did not help the embargo's cause. Although OPEC as a whole organization had not been asked to stop oil shipments, "its two principal non-Arab members, Iran and Venezuela, might have been expected to aid their fellow members' boycott by limiting their own operations," but instead both countries increased their production to make up for the shortages of the embargoing countries (Mosley, 1974, p.345). The non-Arab OPEC states did not feel the same inclination to help the Arab-states enforce their political agenda and halt oil production. For these reasons mentioned above, and for other reasons, the 1967 embargo attempt was an "unsuccessful effort on the part of the Arab oil producers that served no purpose and consequently had no impact or significance" (Daoudi, 1984, p.65). But to write it off as serving no significance cannot be entirely true. It provided the groundwork and provided the learning lessons for the more successful 1973 embargo.

6.2.2 OAPEC Successful Oil Embargo of 1973

In 1968, a year after the failed 1967 embargo, the Arab-oil producing states came together to create OAPEC. OPEC as a unit was united by oil interests alone, but this offshoot branch was created that united the member countries economically, politically and geographically. The advent of OAPEC came about from the heated regional political context and particular international events occurring at the time. OAPEC's original aim was to promote the economic interests and economic cooperation of its member states, as much as it related to oil anyway (Maachou, 1982, p17). The original three founding states–Lybia, Saudi Arabia and Kuwait–still remained within OPEC, but they believed a more regional organization was necessary in order to incorporate political aspects which its members would more likely agree. The difference between OPEC and AOPEC is that the former consisted of countries from Africa, Latin America, Asia and the Middle East, the latter on comprised exclusively of Arab oil-producing countries (Maachou, 1982, p144).

In 1973 the AOPEC countries decided to once again punish the United States for aiding Israeli military efforts against the Arab states. This time it was in the context of the Yom Kippur War, where Egypt launched an attack on Israel in an attempt to regain the land it lost in the Six Day's War. To punish the Americans AOPEC decided to raise oil prices by seventy percent and cut production severely. This time, all the AOPEC countries were in on it and the American economy was affected severely. The embargo crippled the American economy with daily oil shipments brought down from 1.2 million barrels from the Middle East to just 19,000 barrels a day. Between May 1973 and June 1974 the average price of gasoline increased by forty three percent (Organization of Petroleum Exporting Countries). The embargo proved to the developed world that the developing world was not powerless and could, under certain conditions, bring the developed world to its knees. In terms of North-South relations, the embargo was certainly a success.

The response by other, non-Arab Southern nations to the embargo, demonstrates the embargo's success, as far as strengthening Southern bargaining power vis-à-vis the North. Although oil prices for Third World states quadrupled, still the rise of OPEC was generally applauded by the Third World. Third World states most certainly faced the economic ramifications of the embargo, but they also realized that "oil was the one major issue area in which developing states had succeeded in establishing a set of international practices, if not a full-fledge regime" and to criticize OPEC "would have been inconsistent with the intellectual position on which Third World unity was based" (Krasner, 1985, p96). Throughout the crisis, solidarity among Southern states was maintained as they saw the success of the embargo as part of the larger goal of Southern empowerment. The Third World support for OPEC that persisted from 1973 to 1974, "despite the crushing impact of oil increases on the non-oil developing countries, was a model of enlightened commitment to longer term-objectives-and was central to OPEC's initial success" (Ramphal, 1979, p.48). Even though non-oil producing third world countries were negatively affected by the embargo, they were willing to stick it out once realizing how crippling it was for developed countries. OPEC became the model in which to emulate. What the embargo meant in terms of financial losses for the developing world, could be justified by what it could conversely

mean in political gains for the developing world. The benefits were worth the costs. The great potential that AOPEC had in altering the international order was demonstrated by the commitment of other third world states that supported the embargo despite crushing blows to their own economies.

Based on the differences in approaches and outcomes of the 1967 and 1973 oil embargoes, I believe that formally establishing AOPEC and limiting its member states to the Arab oil producing states allowed for a more unified Arab policy to emerge and got rid of some of the collective action problems experienced within OPEC during the 1967 failed embargo. The loosely defined and economically oriented OPEC could not sufficiently provide the galvanizing spirit to subvert the economic and political power of the North. The geographical proximity of the Arab-OPEC states, combined with more similar foreign policies, facilitated the countries to coordinate policies and effectively maintain a unified front. The regional, exclusively Arab composition of AOPEC made coordination easier as common interests were more easily identified. The 1973 oil embargo effectively challenged the power of the Western world. Stephen Krasner (1985), the author of *Structural Conflict: The Third World Against Global Liberalism*, surmises that OAPEC was effective in altering the capitalist world system and represents the "one case of effective Third World use of national power" (43). The oil embargo still represents the biggest and most formidable challenge to Northern supremacy, in any area of the international arena.

6.3 Benefits of Regionalism

The relative success of OAPEC, may be due to the geographical proximity of its member-states. According to political scientist Jacqueline Braveboy-Wagner (2009), regionalism represents a "particular form of multilateralsim in which cultural and geographical commonalities should theoretically allow for even greater cooperation among global south states (7). The regional orientation of AOPEC may have made locating a very definitive issue for third world states to

galvanize behind easier than the tricontinental orientation of organizations such as NAM and Bandung. Regionalism may curtail and/or minimize some of the obstacles provided by the classic collective-action problem, based on the idea that geographically close states may share common goals. By breaking Southern multilateralism into smaller, regional interactions, regions act as "a pattern of regularized interaction...,subordinate to global interrelations," as the "common history and shared identifies of the members of the particular grouping," create an effective cohesive (Braveboy, Wagner, 2009, p64). The more successful and confrontational approach of OAPEC, versus the failed attempt by the disparate OPEC members to successfully enact change and uproot the international system, I believe, may be correlated to the homogeneity of the group.

According to the article "Cooperation in Collective Action," which examines aspects of collective action problems in developing countries, certain characteristics are *detrimental* to cooperation. One namely being "heterogeneity along the lines of ethnicity, religion and social class" (Bandiera,2005, p3). Groups that are socially homogenous may be better at overcoming collective action problems as "all their members have similar tastes, whereas heterogeneous communities find it hard to agree on the characteristics of the common good and are therefore less likely to cooperate in its provision" (Bandiera, 2005, p6). The component of homogeneity may have been what made the OAPEC countries more successful than OPEC when it came to challenging the international economic order established by the developed world. Seeing as at the time of its inception, OAPEC "was entirely homogenous, sharing a common ideology and political outlook and a single conception of their economic interests" (Maachou, 1982 p17). The organization is undoubtedly made up of a variety of countries, but the differences are not insurmountable to the functioning of OAPEC. Egypt and Algeria are large, populous states, while The United Arab Emirates and Bahrain have small populations. Saudi Arabia and Kuwait are major oil producers with economies almost exclusively dependent on oil, while Syria and Iraq have broadly-based economies. Yet despite these differences among members of the OAPEC, "age-old historical linkages, and also recent history and religion have formed a human

type which is the bases of an immediately noticeable level of homogeneity in the Arab countries" (Maachou, 1982, p.89-90).

While the tricontinental organizations of the South such as the NAM should not be dismissed as ineffective, I do think the more regional organizations have been better at challenging Northern primacy and the existing international structure. Smaller, more geographically specific organizations allow for more succinct goals to be defined and pursued. Also, when the groups are small it is easier to determine what kind of collective action problem/s the organization is experiencing in order to understand how e best structure the organization for it to best address these problems. If groups of too large and agendas too broad, it is likely that both collaboration and coordination games are in play. It is very likely that one member of a group will be tempted to defect on a coordinated decision because it is contrary to its rational self-interest, while another member may agree with the group's overall objective, but does not agree with how best to achieve the overall goal. Making the groups small allow for the type of collective action problem to be identified and corrected.

Yet this is not to say that larger organizations do not serve a very useful function as well: providing a forum for Southern frustrations and problems to be articulated. In the article, "A Preliminary Study of the Size Determinant in Small Group Interaction" (1951), Professor John James' looked at group activity within government and economic institutions. Through a series of empirical studies, James found that "action taking" groups tended to be much smaller than "non-action taking" groups (James; Olson). One of his studies revealed that "committees should be small when you expect action and relatively large when are heading for various points of view, reactions, etc." (James, 1951, p475). Although this study was conducted as a bank and Olson's book, in which James' study was found, works within the Economics discipline, Olson maintains that the arguments made in his book can be extended to the study of politics as well (Olson, 1971, p3). James' assessment of groups and organizations provides a valuable function for both types—regional and tricontinental—of organizations. In order to reveal the issues of concern and problems facing third world states, it is important to assemble within the large

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tricontinetal organizations. They provide an effective platform for third world concerns to be articulated and for consensus building. Yet if decisions are to be made and real tangible outcomes are to be produced by third world collective action, smaller, more homogenous groups may be more beneficial than the larger, tricontinental organizations.

7 Analysis-Leadership

7.1 Resolving Collective Action Problems Method #2: Potential Role of China as Leader

It has been mentioned previously in this paper that the individual power capabilities of third world states cannot alone rival the Western world. But the third world may be able to challenge the primacy of the West provided it acts collectively and or, perhaps, has a leader. While the previous section looked at how collective action problems could be resolved using international institutions, this section looks at Yoshimatsu's (2006) second proposed method to achieve international cooperation–hegemonic leadership.

7.2 China as Third World State

In the discussion of North-South and what countries comprise each category, I mentioned the ambiguity of China as a third world state. While political scientists and political economists are in doubt over what category China falls into, China itself has no doubts (Harris, 1986). Despite the fact that China is one of the biggest world economies with a per capita GNP higher than most indisputably developing nations, has debatable status as an "emerging Superpower," and does not have the same history of direct colonization as the other third world states, China has historically aligned itself with the Third World. While there is ample evidence to argue for China's status in either category, perhaps the most convincing argument for China's Third World status is simply, because China says so (Harris, 1986, p2).

Whether technically part of the third world or not, China has always considered the developing nations across the globe as integral forces in international relations and has considered China a fundamental part of this Third World force (Worden, 1986). In the introduction to the book *China and the Third World: Champion or Challenger*, editors Lillian Craig Harris and Robert L. Worden quote an "authoritive Chinese statement" as saying not only is China part of the Third World because it "'has shared the same historical experience with the other Third World nations,' but 'strengthening [China's] unity and cooperation with other Third World nations is [China's] basic foreign policy'" (Worden, 1986, p1). China's historic policy toward the third world has fluctuated from viewing the third world as pawns against the Soviet Union and the United States during the Cold War, to strained relations with third world states during China's Cultural Revolution, and beginning in the 1980s China started to advocate self-reliance and Third World unity against the superpowers (Harris, 5). Despite preaching the message of unity, China was in no position in the 1980s to provide the leadership to unify the Third World. Underdevelopment plagued the Chinese Republic as they tried to move from a central planned economy to a more market economy (Warden, 1987). The China of today would be unrecognizable to the China of the 1980s; the China of today is in a much better position to influence and lead the third world.

7.3 China as Hegemon?

According to Maxi Schoeman (2007), there are six characteristics, based on how states interact within the international community, that distinguish a hegemon:

-A hegemon strives for domination in and of the international system, or, at the very least, domination or control in its own region, whilst attempting to prevent another great power/s to dominate other regions;

-in materialistic terms, such a state would have superlative economic, military and political power;

-its political power would have some institutionalized international recognition, indicated by its role in international institutions;

-it would provide certain benefits (e.g. public goods) to other members in the system;

-it would provide a leadership role which would be directly related to its values and accepted by other states in its sphere of influence and

-it would act to maintain and expand its role and position in what it determines to be its sphere of influence

Rather than going into detail on each of these dimensions and arguing either for or against China's current status as a "hegemon," I will look at a few of these dimensions in which I believe are most telling and indicative of China's potential or actual leadership role. My goal is to not say that China is or is not a hegemon as of yet, but to understand China's real *or* potential hegemonic leadership role within the Global South. Whether China can currently be considered a hegemon is not of great importance to my thesis, I am merely interested in exploring a method in which the Global South could overcome collective action problems: leadership under a dominant actor. I have chosen to use China as the state to apply the theory of hegemonic stability and look at the potential of Chinese leadership because I believe that China fulfills more of Schoeman's criteria than any other state in the Global South. While Schoeman's article focuses on "hegemony" as control or desire for control of the international system, I am looking at hegemony only within the Global South. This is not to suggest that China has hegemonic ambitions, but explore the possible implications of Chinese leadership.

If China does, or can, fulfill Schoeman's criteria for hegemony, and use their superior position vis a vis other Southern states, China *could* use their power to advance the bargaining position of the Global South as a whole. Whether China will chose to use their power for such an end is obviously only something of speculation. But whether only speculative or not, the potential role Chinese leadership could have on the Global South is something worth exploring. By arguing

that China may be currently, or at least headed, in a prime position for hegemonic status of the Third World, then it follows that China could provide the leadership role necessary to overcome collective action problems and unite the third world against the West as proposed by Yoshimatsu. The classification of China as a member of the South or as a Third World state, is, as mentioned before, debatable, but I have chosen to classify it as such based on China's own identification as a member of these communities.

The first of Schoeman's (2007) criteria of hegemonic status–desire for domination of the international system and prevention of others from dominating other regions–may be the hardest to argue in the case of China. China has often "declared its 'offensive against hegemonism' and its aim of 'building a more and just equitable international order' that would advance the South's agenda" with China's Vice Minister of Commerce Wei Jianguo even stating that South-South cooperation is the "cornerstone of Chinese foreign policy" (Schoeman, 8; Jilberto). While these declarations do not suggest hegemonic ambitions, they do profess a desire to bolster South-South cooperation. If understood in these terms, China may be motivated to play the role of Third World leader that the South may need. But despite China's mantra to "hide our capabilities, bide our time, and never be in the limelight," China's policy toward the third world does not make China exactly stage fright either (Moxley, 2010). China's recent role on the African continent may prove contrary to China's official professions. China's official rhetoric of hegemonic ambitions and their rhetorical dogmatism to their "peaceful" rise stands in contrast to their global activity, particularly within the African continent. The *desire* for international hegemony is something vehemently denied by China, but as the adage goes "actions speak louder than words."

Chinese economic interaction with African countries has dramatically increased in the past decade with China reducing or cancelling many African debts, investing in infrastructure-building projects and improving trade relations by cutting tariffs for many of the African countries in which China does business (UNDP). China's activities on the African continent have been claimed to function to counter Western influence and decrease Western involvement on the

continent. Although China's role in the Third World, particularly Africa, has increased dramatically in the past decade, its involvement still pales in comparison to Western activities on the continent. The West's aid, trade and foreign direct investments in Africa still trumps those by the Chinese. China is Africa's third largest trade partner, after the United States and France (Sautman, 2009). China's role in Africa has been described (mainly in Western media) in aggressive terms such as "ravenous," "voracious" and a mad drive for resources, while Western involvement has been described often benignly as "development", "investment" and an attempt at Continental reform (Guerrero, 2006, p1). Despite the differences in adjectives often used to describe Chinese and Western activities, African and other third world countries may prefer Chinese to Western involvement. Unlike the West, China has "no history of enslavement, colonization, financing or supporting for coups against unfriendly regimes or the presence of military forces in support of its foreign policies" (Guerrero, 2008 p3). It is perhaps for this reason that Africa has been so receptive to increased Chinese activities on the continent in the past few years. One very notable advancement in Sino-African relations was the November 2006 summit held in China by Chinese President Hu Jintao to address cooperations between the two regions. At this summit China promised to double aid to African in two years, give $5 billions in loans and credit, create a $5 billion fund to promote Chinese investments in Africa, cancel debt owed to China and provide needed infrastructure across the continent (Zakaira, 2008, p116-117). These political and economic ties between African and China may serve the interests of both China and the African states, but West may not be so happy as Chinese efforts are taking up the "economic, political, and military space that was occupied by Britain France or the United States" (Zakaria, 2008, p117). China naturally, as any real or potential great-power would, seems committed to keeping African to itself. China may indeed fulfill Shoeman's first criteria of striving for international control, as far as Africa is concerned anyway, as China's role grows on the continent while taking up economic and political space that used to belong to the West.

Schoeman's second criteria of hegemonic status is more straightforward and more easy to justify. As far as military might is concerned China has the world's largest armed force with 2.25 million troops, and its possession of advanced nuclear weapons puts in a category with only nine other

states with confirmed nuclear capabilities (Dellios, 2004-2005). China spends the second most amount of USD per year on the military (although admittedly many billions of dollars behind first place United States, but billions of dollars ahead of any other Southern state), with China's 2010 defense budget at around 77.9 billion USD, 7.5% more than last year's budget. On average, China's defense spending has increased around 12.9% annually since 1989 (China's Defense Budget). China's staggering economic power is equally as impressive. Recently, in August 2010 China surpassed neighboring Japan to become the second largest economy in the world, both in terms of nominal GDP and in terms of purchasing power parity, with China's 2010 second quarter output at 1.337 trillion USD (A.R., 2010; Huang, 2010). Additionally, China is currently the world's largest national exporter and the second largest importer of goods. The past two decades has witnessed phenomenal economic growth by China. Between 1980 and 2003, China's share in world exports rose from .9% to 5.8%, with its imports having an equally impressive growth from 1.0% to 5.4% of total world imports (Jilberto). As far as political power is concerned, China enjoys a position in global politics and economics unrivaled by any other Global South nation.

As criteria three stipulates, China's political power is demonstrated by its "institutionalized international recognition" through membership in international organizations. China is one of five states, and the sole third world state, to sit on the United Nation's Security Council, giving China the powerful option to veto Security Council decisions. China is also one of the member-states of the G-20 bringing together industrialized and developing countries to tackle global economic issues. China's demonstrable economic, military and political power puts in a position of unparallel strength relative to other Third World states. China's increasing role and interaction with third world organizations is also quite telling and perhaps indicative of its leadership role in the Third World. Although not a member of the Non-Aligned Movement, China does have status as an observer state and according to its official NAM position, "China sets great store by the developing and strengthening its relations with the Non-Aligned Movement and support its reasonable proposals and just cause" (Ministry of Foreign Affairs, China and the Non-Aligned Movement). Within the Group of 77 China is also not a member but does enjoy "observer"

status and according to the Ministry of Foreign Affairs to the People's Republic of China, China "has all along supported [G-77's] just positions and rational demands and maintained good relations of cooperation with it"(Ministry of Foreign Affair, China and G-77). Through its encouragement and interaction with third world organizations such as NAM, G-77 or BRIC, China has "largely embraced the opportunity to enhance the bargaining power and overall clout of developing countries" (Moxley). China has established itself as a main player on the international arena through its membership in an array of international organizations.

The forth criteria–"providing certain benefits to other state's in the system"–may be the criteria best demonstrated by China. China has provided a great counterweight and alternative to Western assistance in the developing world, particularly in Africa. China's "business is business" and its commitment to the principle of national sovereignty, have made China an attractive business partner for many third world states, one reasons being, China has no qualms about the internal politics of the countries it does business (Lyman, 2005). For instance, In 2007 the Nigerian government negotiated a $5 million loan from the World Bank to improving the Nigerian train system. The Bank was prepared to issue the loan on the condition that Nigeria "clean up the notoriously corrupt railway bureaucracy," but at the last minute China stepped in and offered a no-strings-attached $9 *billion* loan to Nigeria (Zakaria, 2008, p117). Naturally, Nigeria accepted China's offer, much to the chagrin of the West and the World Bank. China provides the third world, particularly Africa, with access to easy money that Western countries and institutions would normally apply political stipulations. Africa can continue "business as usual" and avoid Western pressures to politically and economically reform. China's no-political-questions-asked business policy has resulted in China supporting many authoritarian states that the West does not approve, such as Mugabe's Zimbabwe and al-Bashir's Sudan (Jilberto). To further highlight the laxness of Chinese business with Africa, in 2004 while the IMF chastised Angola for corrupt oil deals, Angola exported a quarter of its oil to China, "in return for which [Angola] received Chinese loans and aid, including funds for Chinese companies to construct (rail-) roads, bridges, schools, hospitals, and a fibre-otic network" (Jilberto). China offers an

attractive alternative to the conditionality of Western money and aid. These political and economic benefits provided by China corroborate Schoeman's fifth criteria of hegemony.

The last two of Schoeman's criteria are less tangible and harder to argue for the case of China. As far as China providing a leadership role to the third world, China denies that it has aspirations of third world leadership and claims that the Third World needs no leader (Harris, 1986, p5-6). The sovereignty of each state places all third world states as political equals and therefore there is no need for a leader-follower relationship, according to China's official rhetoric. Yet despite these declarations, "clearly however, China sees itself as an advisor and facilitator to the Third World, a sort of political-elder brother posture" (Harris, 1986, p6). Although China is understandably cautious to claim or seek any leadership role among third world nations, many third states do indeed look to China to lead the way and to provide the counterweight to Western dominance (Moxley). It is hard to say if China wants to provide a leadership role to the third world, or that is hopes to maintain and expand its influence in the third world, as Shoeman's last two criteria stipulate. Perhaps only time will tell if these last two criteria come to fruition. But whether or not these two, or any of the criteria for that matter, are real, hypothetical or imagined are certainly worth understanding the consequences of Chinese leadership.

7.4 Benefits of Hegemony

At this point in time, the Third World has no definitive accepted leader. And although China states it does not want to assume such a role, and denies that the Third World needs such a role, there is great benefit that Chinese leadership could provide for the Third World. As mentioned previously, one of the benefits of hegemony (beyond the individual benefits provided for the hegemon itself), is its ability to negate the effects of disparate issues and overcome collective action problems in order for actors to work cooperatively. With China as the dominant–militarily, politically and economically–state within the Global South, China can take advantage

of its position to advance the position of the South. As a real or potential third world hegemon, China has the power to create and enforce rules that the less powerful states must follow. The political, economic and military weight China has provides proper incentive for other third world states to follow its policies. This in turn with eliminate transaction costs and extensive discussions, since what the hegemon says, goes. Preponderant hegemonic leadership reduces uncertainty, "since each ally can deal with the hegemon and expect it to ensure consistency for the system" (Koehane, 1984, p138). The smaller states in the international system know what to expect as the rules and patterns are set largely by one, dominant player. A certain degree of expectation and familiarity may emerge as smaller states are able to discern general patters in the rules the hegemon will enforce. Hegemonic leadership is one of the ways to overcome collective action problems as decisions are left to the hegemon and thus neither coordination or collaboration problems could result. When all or a majority of states within a group recognize one state as dominant and of greater importance, it will be in the interest of all the smaller states to go alone with the preferences of the dominant state (Yoshimatsu,2006, p6). In a state of anarchy, hegemony serves a pseudo governmental function as it provides a sort of order and stability as smaller states within the system learn what to expect.

8 Conclusions

8.1 Institutions or Hegemony?

This thesis attempted to answer the question: under what conditions Southern collective action can successfully challenge the power of the North? The two methods looked at were Southern institutions or hegemonic leadership. This section will look at both methods, not a side-by-side comparison, but a holistic comparison. The recommendations reached will be based on ethical considerations, as well as considerations based on what is best for the South, in terms of creating equity between North and South nations.

While hegemonic leadership may undoubtedly provide an effective method of overcoming collective action problems, there are drawbacks, from an ethical standpoint. It raises the fundamental question: "how much asymmetry is beneficial to whom and under what circumstances"? (Snidal, 1985, p614). Whether hegemonic leadership is to be assessed as coercive, benevolent, malevolent or/and exploitative depends on who you ask as it is unlikely all actors under the patronage of a hegemonic leader will view the leadership in similar terms. When there are preponderant power asymmetries among states there is doubt that the benefits of hegemonic leadership are mutually beneficial, or that the benefits ever reach the subordinate states at all (Snidal, 1985). Depending on how powerful the hegemon is and the level of power it chooses to exert, the less powerful states will likely not have much say in whether they accept the hegemon or not (Schoeman). The likelihood for exploitation is great when the agency of the smaller participating actors is limited, as it is in a hegemonic relationship. Perhaps one way of increasing the legitimacy of hegemony and steering away from exploitation, as proposed by Kindleberger (1981), is for two or more countries to "take on the task of providing leadership together, thus adding to legitimacy, sharing the burdens, and reducing the danger that leadership

is regarded cynically as a cloak for domination and exploitation" (1981, p252). Hegemonic leadership needs to have checks and balances to its power, such as through having more than one state share power, if it wants to avoid claims of exploitation. In the case of hegemonic leadership, there can be a fine and blurry line between exploitation, and leadership.

Also, hegemonic leadership can be unstable as there is no guarantee that the position of hegemon will be accepted by the hegemon or accepted by the other, smaller states. It could be the case that the "leader becomes corrupt, or is perceived as such; the leader becomes tired of free rides, or believes he or she is being bankrupted by excessive burdens, or both" (Kindleberger, 1981, p251). The potential for disruption and turmoil in such a system as hegemonic leadership is great when there is no enforcement mechanisms and no provisions that a hegemon must continue as a hegemonic power. In the history of world politics and world economics, there are instances of fallen, or relinquished, hegemonic states. Such was the fall of the British Empire up until the First World War. While the lack or change of a hegemon may not necessarily result in turmoil or chaos, it still does point to the instability of hegemonic leadership and its utility as a method of promoting international cooperation. Threats to hegemonic leadership can come from the outside as smaller, participating states may be motivated to overthrow the hegemon. The smaller states can decide to not accept what they consider to be the exploitation, rather than leadership, of the hegemon (Kindleberger, 1981). But threats to hegemonic leadership can also come from within the hegemonic power itself. The leader can decide it does not want to be a hegemon as the "leader grows weary under burdens which grow as more and more free riders seek more luxurious free rides. The means of stabilizing the system are self-evident" (Kindleberger, 1981, p251). Threats to hegemonic leadership can come from within or without, with no guarantees or mechanisms in place to secure the system of hegemonic leadership.

Another very important point of consideration, is if the point of South-South cooperation is to eliminate all lasting and continuing remnants of colonialism and Northern exploitation, it may not behoove the South to simply replace the West for China. Of course China's hands may historically be cleaner than any industrialized state when dealing with Third World states. While China's lack of a formal colonial history, and their self-proscribed status as a fellow Third World state may give them a privileged position, it should not be taken for granted that China's Third

World involvement is necessarily benevolent or altruistic—in sum opposite of Western activities and motives. China mustn't necessarily be viewed as the antithesis to Western power over the Third World.

Of course it is important to understand that these two proposed methods do not have to operate as one or the other. They are not necessarily antagonistic. The existence of one does not preclude the existence of the other. According to hegemonic stability theory, the existence of a hegemon can help facilitate the establishment of regimes or international organizations (Goldstein, 2005; Koehane, 1984). The creation of the UN, NATO and The IMF are examples of organization that were created and maintained largely through the preponderant power of the United States. There are many ways to combine the two methods where you get the benefits of each while also overcoming each method's weaknesses. Based on the findings of this study, I surmise that it would behoove the South to have a leader, such as a China, while also having strong regional organizations. Strong organizations comprised of more homogenous, geographically approximate states can help the cohesion of the organizations. Regional, homogenous organizations may increase the probability that member-states can agree on a tangible policy and coordinated action, much the way that OAPEC did in 1973. Also, these strong regional organizations will be better equipped and able to act as a cohesive unit and united voice within international organizations such as the UN. The semblance of unity within international organizations will give the Third World the credibility it needs to negotiate with the West. China can act as leader and provide the hegemonic leadership needed, or at least desired, to negotiate on behalf of the Third World and provide a definitive negotiating strategy. The combination of strong regional organizations and hegemonic Chinese leadership, may act to counterbalance the weaknesses or each. China has the political, economic and military clout to effectively challenge Western dominance and negotiate on more equal footing than any other Southern state. China is a formidable player on the international political field and has the international credentials to lead the Third World. China can use its current UN membership and economic might to champion Third World issues and represent a Third World voice.. However, the susceptibility of hegemonic leadership to empire, cannot be ignored. In order to mitigate the propensity toward

non-benign leadership, the strong regional organizations will serve to check the power of the hegemon. The strong regional organizations should be strong enough where the hegemon will need to be mindful of the organization's power and feel pressure to keep these organizations pleased. The hegemon will not be able to exert unbridled, unilateral power as long as strong organizations exist to keep the power of the hegemon in check. It is for these reasons and with the interest of eliminating inequalities among states that I propose *combining* both methods of institutions and leadership, rather than choosing one or the other.

8.2 Thesis Conclusions

This thesis is predicated on the idea that there exists great and harmful disparities between states, within the international system. Those states classified as part of the Third World or the Global South are lagging far behind those in the First World or Global North. I have defined the relationship between North and South in dependency and neocolonial theory, with relations between the two camps mainly antagonistic and exploitative. Due to the limited power capabilities of individual Southern states, I maintain that it is imperative, for Southern states to work collectively. In fact, it may be their only recourse for ever being able to influence current international power configurations and challenge the primacy of the North. Recent Southern organizations and attempts at Southern unity point to the fact that many Southern states still feel marginalized within the international political environment and still have the need to think and act collectively against the North. Southern states understand their subordinate position and want to do something to ameliorate the situation. While prominent and outspoken leaders such as Hugo Chavez and Muammar al-Gaddafi are certainly high on rhetoric, it will take much more than words and anti-West slogans to instigate change and motivate the South to work together.

There undoubtedly have been many past attempts at collective Southern action, but there have always been reasons that have prevented the South from creating sustainable, lasting changes. Southern states, as do any group, face collective action problems that can be debilitating if not

overcome. Yoshimatsu (2006) proposes two methods of overcoming these collective action problems within groups—building institutions and hegemonic leadership. Using these two methods I applied them both to Southern states and Southern collective action. The first method, institutions, was analyzed based on past attempts of Southern collective action in order to discern what have and have not been successful elements of Southern institutions. Based on particular group theories and looking at empirical examples, smaller, more homogenous groups facilitated decision-making and action-taking within Southern groups. The lack of tangible results produced by the tri-continentally oriented Southern organizations such as the NAM and the G-77 is contrasted to the much more successful and effective—if tangible results and retrospective assessments are to be the indicators—OAPEC. OAPEC as an organization was able to effectively challenge the role of the North through OAPEC's 1973 embargo. I argue that is the regional-orientation and more homogenous composition of OAPEC that makes it relatively more successful than the heterogeneous, tri-continental organizations.

When looking at the second of the two methods, leadership, I explored the potential leadership that China could provide for the Third World. Although China may not as of yet represent a hegemonic leadership, its potential as such is worth exploring. If China was motivated to pursue hegemonic Third World leadership, it may provide the Third World with effective leadership that will eliminate the collective action problems by making unilateral decisions on behalf of Third World states.

When deciding which of Yoshimatsu's two proposed solutions for overcoming collective action problems should be pursued by the Third World, it is difficult to determine. The first method, organizations, was tested using actual empirical data, while the second method, leadership, was based on potentialities and an as of yet, hypothetical situation. Yet despite this importance difference between the analytical frameworks of each method, for ethical reasons and for the overall, lasting benefit of the South, it would be in its best interest to work within regional Southern organizations while also relying on hegemonic leadership. How will these organizations look and who will provide this leadership? That is yet to be determined.

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