

# ТЕОРЕТИЧНІ ПОЛОЖЕННЯ СОЦІОЛОГІЧНИХ РОЗВІДОК

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UDC 31(322+344.3):303.094.2

Cherniak, K. (2021). Sociology from the Global South and the Global North: Systematising Characteristics and Relations. *Sociological Studios*, 1 (18), 6–13. <https://doi.org/10.29038/2306-3971-2021-01-06-13>

## Sociology from the Global South and the Global North: Systematising Characteristics and Relations

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DOI: 10.29038/2306-3971-2021-01-06-13

Received: May, 2021  
1<sup>st</sup> Revision: May, 2021  
Accepted: June, 2021

The article defines characteristics and relations between sociology from the Global South and the Global North, depicted in the literature. Despite the variety of research on the topic, studies of Northern and Southern sociology lack definite description of regional sociologies and their (unequal) relations as well as clear indicators used to assign countries to either region in terms of sociology that still uses classical geopolitical division. On the basis of research of knowledge production and academic relations between Southern and Northern sociology, the author defines main issues of discussion and specific characteristics of these regional sociologies and systematises them under one model. The model reflects four main areas of confrontation between sociology from the North and the South: origin and historical development; research orientation and capabilities; recognition and influence on the global scale; research cooperation and flow of knowledge. In addition, the article presents the alternative model for the recently emerged resistant Southern sociology. In the further research the model can be used to define understudied issues, (re)assign countries concerning sociology and investigate the actual characteristics of Southern and Northern sociology in comparison to the ones presented in the research.

**Key words:** Global South, Global North, sociology of sociology, knowledge production, academic cooperation.

**Черняк Ксенія. Соціологія з Глобального Півдня та Глобальної Півночі: систематизація характеристик і відносин.** У сучасній соціології зростає інтерес до досліджень самої соціології в глобальній перспективі, у тому числі, з позиції її поділу на соціологію Глобального Півдня та Глобальної Півночі. Такі дослідження звертаються, передусім, до виявлення нерівності у виробництві знань й академічних відносинах соціології регіонів. Результати цих досліджень є не систематизованими та користуються класичним поділом країн на Південь і Північ, що призводить до продукування однакових висновків на прикладі обмеженого ряду країн. У цій статті запропоновано інструмент для розв'язання цих проблем у вигляді моделі характеристик та відносин соціології з Глобального Півдня й Глобальної Півночі. Побудована на базі наявних досліджень соціології регіонів та їх відносин модель систематизовує ці дослідження в чотири категорії, кожна з яких уключає певні характеристики Північної й Південної соціології. Додатково в статті описано модель альтернативної незалежної південної соціології, що активно розвивається в останні роки. У подальших дослідженнях модель може використовуватися для актуалізації поділу країн на Південь та Північ із позиції соціології й визначення ще не досліджених тем цього напрямку.

**Ключові слова:** Глобальний Південь, Глобальна Північ, соціологія соціології, виробництво знання, академічне співробітництво.

## RESEARCH SIGNIFICANCE AND DEFINITION OF A RESEARCH GAP

The theory of the North-South divide appeared around 1970s in geopolitics and international relations and later was introduced to sociology through globalisation and post-colonial studies (Dados, Connell, 2012). From that point the theory has gained increasing interest in sociology and social sciences in general (Pagel et al., 2014), especially, in urban sociology (Garrido, 2021), sociology of social movement (Motta, Grunvald, 2011), intersectional studies (Misra, Curington, Green 2021) and already mentioned globalisation and post-colonial studies (Go, 2013).

Among others – and this is the particular focus of the current paper – the concepts Global North and Global South are actively used in sociology of knowledge, critical sociology and sociology of sociology to analyse features of knowledge production and (unequal) academic cooperation between regions – both generally and with specific attention to social science and sociology (Connell, 2007).

However, despite the wide variety of studies of sociology in the framework of the North-South divide, they have at least two crucial gaps: 1. Such studies concentrate mainly on revealing inequality in academia itself and on the development of ways to fight it, while they lack systematisation and clear characterisation of sociology from the North and the South; 2. Absence of clear characteristics leaves obscurity, first, around the theoretical and empirical basis on which countries are assigned either to the North or to the South in terms of sociology, second, about the actual inequalities between regions and actual areas of academia where these inequalities exist.

Consequently, studies are majorly based on the classical geopolitical division of countries that has been claimed to be outdated already in 2000s (Reuveny, Thompson, 2007) and is doubtful to fit global positioning of countries with regard to academia. Moreover, due to geographical uncertainties, researchers often address only clearly assigned countries (e.g., USA and Western Europe as the North, and Latin America, India, South Africa as the South (Pagel et al., 2014)). Other countries either change their position based on the scholar's view, or do not appear in studies at all (e.g. Australia, post-soviet countries, with rare exceptions), though they are claimed to investigate *global* (sociological) academia. In addition, absence of systematisation of existing studies factors into the repetition of outcomes instead of research progress and work towards the equalisation of research communities.

Therefore, in times of increasing concentration on global problems and increasing outlook of “core” sociological research towards global issues, studies that aim to equalise global research community use outdated classifications, exclude ambiguous countries from the analysis and make no headway. Under such conditions emerges the need to systematise already defined characteristics and relations of sociology from the Global North and the Global South and create the tool to (re)assign countries to both regions in terms of sociology.

### 1. REVIEW OF THE RELEVANT STUDIES

The issue has been already investigated concerning the classical vision of the theory of the North-South divide within geopolitics, international relations and political economy. Several researchers stated a wide variety of oppositions that define the Global North and the Global South in relation to their economic, social and political development: wealthy and poor, technologically innovative and agriculture-oriented, high and low reproduction rate, level of education, level of corruption etc. (Jackson et al., 2016; Odeh, 2010; Reuveny, Thompson, 2007).

Some researchers have also responded to the critique of the outdated classical division of countries between global regions, stating that concepts are not only geographical, but also symbolical, and rather describe unequal interstate relations around the world (Dirlik, 2015). Thus, as the geographical locations loses its crucial role in the theory, the South and the North are claimed to appear in different parts of the world and within one another; even one country or specific location can contain both (Dainotto, 2017; Jackson et al., 2016).

However, neither definite characteristics of the classical North and South, nor de-emphasis of the geographical component of the theory do not solve the problems concerning modern studies of Northern and Southern sociology.

First of all, though in principle relations between social sciences from both regions do not differ from the classical dichotomy «domination» and «suppression» (Odeh, 2010), actual division of countries based

on the classical socio-economic and political dichotomies may and do not reflect the division in terms of science. Moreover, rules and norms of knowledge production vary between scientific disciplines (Lamont, Guetzkow, 2016; Wellmon, Piper, 2017). That is why in the current paper we primarily address sociology, and not social science or academia in general. Concerning the interdisciplinary nature of the research of academic relations between the Global North and the Global South, it is sometimes hard to distinguish sociology from other social sciences, so the conclusions made in the paper may be expanded also on other social disciplines. However, sociology is the main focus of the current research, as the area of our interest and expertise.

Following the first argument, systematisation of characteristics of social science and sociology from the Global North and the Global South is still missing. In addition, modifications of the geographical component of the theory are only partially relevant for the studies of sociology: though they offer the North and the South exist in any part of the world, the (re)assignment of countries is still needed as modern science is primarily defined and discussed in terms of nation-state, and, less often – of specific institutions.

## 2. THE PURPOSE AND TASKS, AND EMPIRICAL BASIS

Thus, the purpose of the current paper is to create a model of characteristics and relations of sociology from the Global North and the Global South. Accordingly, the tasks of the paper are to collect and review the existing researches on the knowledge production and academic cooperation of sociology from the Global North and the Global South, define main issues of discussion and characteristics assigned to the North and the South, and systematise them under the common model.

Reviewed researches serve as an empirical basis of the study. It should be mentioned that, due to the language restrictions, only researches in English are considered (no relevant studies are found in other languages the author speaks fluently).

## 3. OVERVIEW AND SUBSTANTIATION OF THE RESEARCH RESULTS

Hereby we present the model of the characteristics and relations of sociology from the Global North and the Global South (Table 1). Main issues of interest of the reviewed researches laid the foundation for the main categories of the model. Definition of specific characteristics under the categories assigned to the Northern and Southern sociology is based on the dichotomous principle, as the Global South and the Global North are claimed to be meaningful only when considered together and in opposition to each other (Rigg, 2015). To offer another point of view, in addition we present an alternative set of characteristics of sociology from the South captured in the literature (Connell, 2014; Kuchma, 2018) – so-called Southern resistant sociology that has been developing recently and seek to become the equal partner and competitor of the Northern academia.

It should be noticed that the model represents only the view of the Northern and Southern sociology presented in the literature and widely accepted in scientific discourse, and may not reflect the actual level of qualification and potential of the research communities. Thus, the model is rather the “ideal type” that represents tendencies captured in different research and serves as an analytical reference point to deal with problems stated above. Though, the model can be also used to compare the scientific discourse with actual state of social research in the regions.

Table 1

**The Model of Characteristics and Relations of Sociology  
from the Global North and the Global South**

<b>Global North</b>	<b>Global South</b>
<b>1</b>	<b>2</b>
<i>Historical Development</i>	
Place of origin of sociology	Sociology came from the North through colonialism and capitalism
Euro-American, Western academia	Post-colonial, non-Western academia
Classical sociological theory	Subordinate, dependent sociology
<i>Research Orientation</i>	
Pure, theoretical and conceptual research	Applied, practical research

The End of the Table 1

1	2
General studies	Area studies
Produce both theoretical and empirical knowledge	Produce only empirical knowledge
Studies of own and other countries	Studies of own country
Comparative studies	Single-case studies
Produce universal knowledge	Produce locally-relevant knowledge
<i>Position on the Global Scale</i>	
Dominate in international sociological community	Forced to internationalise
Establish research agenda and trends	Depend on the Northern research agenda
Establish standard of excellence for knowledge production	Try to catch up with Northern standards
Produce high-quality research	Produce poor-quality research
Central, mainstream knowledge	Marginal knowledge
Visibly large output of global social knowledge	Almost invisible contribution to global social knowledge
<i>North-South Research Cooperation</i>	
Theoretical and analytical work	Technical and field work
Process the data, produce theory and explanations	Supply data, apply knowledge from the North
Set research agenda and priorities	Conduct research irrelevant for local issues
Developed sociology, producing pathbreaking and viable knowledge	Backward sociology, has to catch up
Flow of knowledge outside	Flow of knowledge from outside
Rejection of alternative views, homogenisation	Rejection of local views and contexts

Source: *author's compilation.*

The main model consists of four categories.

The first category of the model – *historical development* – relates to the origin and development of sociology in regions. The common view on the issue is that sociology originated in the Global North, (or the West, in earlier terminology) (Oommen, 1991; Alatas, Sinha, 2017) and lately was expanded in countries of the Global South – colonies and non-Western territories – through the structures of colonialism and capitalism. As follows, Northern sociology is considered as a successor of a classical theory, while Southern sociology is only subordinate to it (Keim, 2008). The bright example of such a lie of matters is the content of the course of the classical sociological theory: in both the North and the South it is based on similar program that includes only European and American sociologists, disregard of the social and historical context of the country and existence of any other, non-Western founders of the field (Alatas, Sinha, 2017; Keim, 2008). Such historical framework affects the common impression about which countries have strong sociological schools, high-quality sociological research and long-term tradition of production of the fundamental sociological theory.

In sum, the category reflects the opposition between primary, classical Northern sociology and subordinate and dependent Southern sociology.

The second category is *research orientation* and it relates to the types and focus of research mainly done in the region and the possibility to generalise it. The research type is based on the intellectual division of labour between theoretical-analytical research done mainly by Northern sociologists and empirically-oriented studies conducted in the South (Alatas, 2003; Baber, 2003; Collyer, 2018). Besides, Northern scientists are claimed to mainly conduct comparative studies of both own and other countries, expanding the area of interest and increasing the research's international significance, while scholars from the South are supposed to focus on the local mainly single-case studies (McDaniel, 2003; Keim, 2008).

These two perspectives also influence the ability of the research to be generalised in different contexts. Northern comparative pure research and Northern theory are considered as universal and useful regardless

the social context (Baber, 2003; Connell, 2007; Keim, 2014) – although their theoretical conclusions are often based on the study of specific (Northern) locations (Connell, 2014). In contrast, the Southern applied single-case studies are supposed to be suitable only for local implication and have no theoretical contribution to make (Keim, 2008), while Southern fundamental theory barely exists due to the lack of demand (Alatas, Sinha, 2017).

The last pattern is empirically demonstrated already by Baber (2003) on the example of research publications: while Southern researchers mostly indicate the location of investigation in the title, Northern scholars rarely mention it, claiming the universality of the research work.

Hardly the only way for Southern scholars to overcome this pattern is to emigrate to the Global North and promote universal theories «from the South» while being supported by a recognised Northern institution. However, such strategy often fails – over time migrated researchers lose connection to local reality and problems (Richards, 2014) or end up in the institutes of area studies (Keim, 2008). The same is true for returned scholars who, after coming back, remain actively engaged in international academic network (Keim, 2011).

Thus, the category «research orientation» contrasts sociology from the North and from the South in terms of universal and fundamental versus local and practically-oriented.

The third category – *position on the global scale* – refers to the global visibility and recognition of sociology, its influence on the knowledge production process and quality evaluation. Affected by the long-term dominance in political and economic areas, the Global North also takes leading position in international sociological community (Keim, 2011): establishes international research agenda, theoretical and methodological trends, and standards of excellence of knowledge production (Alatas, 2003; Collyer, 2018). Concentration of the vast majority of academic publishing houses (e.g., Springer, Routledge) and prestigious index systems (e.g., SCOPUS) and their orientation on the Northern research tradition only promotes such a position (Collyer, 2018).

In contrast, Southern sociology is forced to internationalise in order to get more recognition and visibility on the global scale (Keim, 2011): write in English and publish in Northern journals, follow Northern research agenda and work criteria (Connell, 2014; Gray, 2009; Keim, 2011). As a result, only small number of Southern researchers and journals manage to get international recognition (Collyer, 2018).

General dominance of the Global North in international sociological community has its consequences for the evaluation of sociology of both regions. Northern sociology gains the advantage to produce mainstream knowledge published mainly in respectful «international» databases (Keim, 2011), increasing own visibility and professional recognition on the global scale (Keim, 2008); sociology from the South is considered to be less developed and marginalised, while Southern sociological works are largely overlooked (Connell, 2007; Costa, 2014; Keim, 2014).

Southern sociologists still get some recognition – International Sociological Association encourages more and more scholars from the South to take administrative positions, and the number of Southern scholars at the main international conferences such as the World Congress of Sociology increases (Keim, 2008). However, it is hard to say what is the reason behind – the aspiration of the global sociological community to reach the equal representation of different sociology or the increase of the number of Southern sociologists who follow Northern standards.

Thus, the category «position on the global scale» reveals the dominant position of the Northern sociology and its knowledge production on the global scale, and the subordinate and marginal position of the Southern sociology that strives to catch up with Northern standards of knowledge production and get recognised.

The last category is called *North-South research cooperation* and includes two dimensions of the relations between sociology from the Global North and the Global South – cooperation in the research conduction process and flow of scientific knowledge.

The research cooperation between the North and the South is aligned with the regions' research orientation and global influence. Claiming the establishment of an equal partnership, scientific cooperation between the North and the South often results in unequal division of roles and unequal outcomes of the research. Sociologists from the North mainly analyse the data, provide theoretical explanations and produce new knowledge, whereas Southern partners only provide with the empirical data and apply theories created

outside (Connell, 2007, 2014; Keim, 2014). Moreover, long-established views on research quality and possibilities of both regions, and the frequent funding of the research from the North (Rosseel et al., 2009) put a priority on Northern research interest and needs. Thus, at the end the North is provided with publishable knowledge, while the South is often left behind with the data irrelevant for local problems (Kreimer, Zabala, 2008).

Following the previous findings, the flow of knowledge appears to happen unidirectionally, from the North to the South. The Global North represents the centre of sociological innovations and pathbreaking ideas (Keim, 2011, 2014), while sociology in the Global South is intellectually inferior and has to catch up, through the introduction of Northern theories and invitation of Northern professionals to teach high-quality research (Alatas, Sinha, 2017; Connell, 2014; Martin, Wyness, 2013). Whereas the Global North rejects any alternative sociology, global sociological knowledge is being homogenised, or, rather, Northernised (Oommen, 1991; Alatas, Sinha, 2017).

The tendency is reflected, for example, in citation analysis – both Northern and Southern scientists lean towards «core» publications while Southern works are rarely cited (Collyer, 2014; Danell, 2013). It seems that even when Northern scholars write about Southern societies, they still approach English-written Northern literature instead of familiarising themselves with the relevant local research (Costa, 2014).

In sum, the category «North-South research cooperation» represents the unequal scientific collaboration between the North and the South that profits only Northern scholars, and the unidirectional flow of sociological knowledge from the North to the South.

The described model presents several groups of struggles between sociology from the Global North and the Global South, and their prescribed positions. The categories are interrelated, so specific dichotomies often coincide with one another, reflecting similar tendencies in different areas.

As was already mentioned, in order to have a complete picture of possible positions, below we also list separately characteristics of the developing resistant sociology from the South and South-South research cooperation (Table 2).

Table 2

#### Characteristics of resistant Southern sociology and South-South cooperation

South Resistance	South-South Cooperation
Promotion of heterogeneity	Equal participation and influence on research
Development of non-Northern theory	Regional funding of research projects
Attention to local	Multidirectional flow of knowledge
Alternative knowledge systems development	Creation of regional knowledge production standards
	Promotion of open-access

Source: *author's compilation.*

The main goal of the *Southern resistance* is to overcome existing inequalities in academia between regions and promote heterogeneity in sociological knowledge. This goal is carried through three main approaches: critical unpacking of dominant Northern theories and standards, as is done in the researches reviewed in this paper, as well as promotion of changes in the local curriculum (Alatas, Sinha, 2017; Connell, 2014); drawing attention to the local ideas and local issues (Dados, Connell, 2012; McDaniel, 2003); development and increase of significance of the local fundamental knowledge, especially the one aimed to explain the functioning of society and its development patterns (Keim, 2011; Richards, 2014).

In line, *South-South research cooperation* presupposes equal settlement of research priorities and division of tasks between participants (from the Global South) (Rosseel et al., 2009), and multidirectional flow of knowledge – from one part of the Global South to another and other way around (Oommen, 1991). Crucial for the Southern resistance is the development of regional standards of knowledge production and respective research databases that favour (open-access) local journals, tolerate national languages and welcome scholars who write about local issues (Kuchma, 2018), e.g., Brazilian Scientific Electronic Library Online (SciELO) and its African analogue SciELO SA (Collyer, 2018).

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## CONCLUSION AND RESEARCH PROSPECTS

Therefore, in the current study we systematised the existing researches on the knowledge production and academic cooperation between sociology from the Global North and the Global South and created a model of the respective characteristics and relations. The model reveals still dichotomous nature of the relationship between the South and the North and its reflection on the position and relationship between regions concerning science and sociology. In addition, we listed characteristics of the recently developing Southern resistant sociology that appear to be the second possible form of existence of sociology from the South and shatter the classical view on the Global North and the Global South as existing only in opposition and in tight relation to each other.

Considered together, models solve the problem of the absence of the systematic view on the research done in the field and densely summarise existing findings. Further, the models can be used by the researchers of Northern and Southern sociology to modify the classical division of countries inside the North-South divide in regard to sociology, and to position countries and regions that nowadays fall out from the analysis. In addition, they can be used as a primary reference to define understudied research areas and research gaps. Considering, that models present the image of Southern and Northern sociology captured in the research literature, they also can be used as the empirical tool to compare the «widely accepted» view on Northern and Southern sociology with their actual characteristics and positions.

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