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# Theories and Approaches of the North and South

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## Abstract

We attempt to explain the term "north and south" and their concepts, and also examine the other relevant terms that have the features and characteristics of the north and south concepts. As a method, we use structural theories including underdevelopment and dependency which in fact illustrate the type and nature of the structure of North-South relations. It is resulted that the efforts done to reach advancement in the South countries have also failed. As conclusion, still some significant problems remain, such as inequalities, global poverty and declining living standards and many of these countries are in a high vulnerability position.

**Keywords:** North, South, Approach, Capital.

# Teorías y enfoques del norte y del sur

## Resumen

Intentamos explicar el término "norte y sur" y sus conceptos, y también examinamos los otros términos relevantes que tienen las características y características de los conceptos norte y sur. Como método, utilizamos teorías estructurales que incluyen el subdesarrollo y la dependencia, que de hecho ilustran el tipo y la naturaleza de la estructura de las relaciones Norte-Sur. Como resultado, los esfuerzos realizados para alcanzar el avance en los países del Sur también han fracasado. Como conclusión, aún quedan algunos problemas importantes, como las desigualdades, la pobreza global y la disminución del nivel de vida, y muchos de estos países se encuentran en una posición de alta vulnerabilidad.

**Palabras clave:** Norte, Sur, Enfoque, Capital.

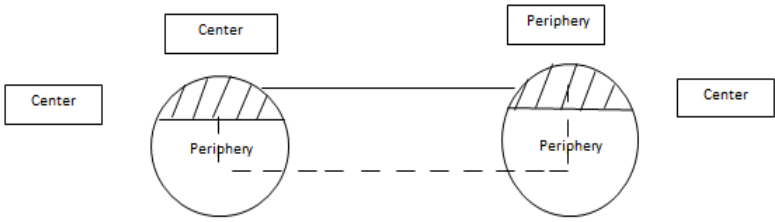
## 1. INTRODUCTION

Here we discuss the theorizing of North-South relations, and we try to look at this from a realistic point of view; in other words, we present theories and approaches that have an explanatory basis rather than prescriptive. This means that how is the dominative relation of the so-called northern countries on the so-called southern countries, rather than how it should be. Throughout the history of international relations, both the old colonialism and the new colonialism have sought to gain, preserve and increase their domination/sovereignty over colonial countries, and to subjugate and exploit other nations, mainly located in the southern outskirts of the planet. Theorization in

this regard and this section is devoted to how such a dominative relationship has been; has it been an obligatory type or dependency, etc. Hence, in the following, we present significant theories explaining and discussing the dominative north-south relationship as well as examining the structure of North-South relations/communications. Therefore, in next, some theories are explored; like the division of labor (Elahi, 2010), structural theories (including underdevelopment and dependency), etc., which in fact illustrate and characterize the type and nature of the structure of North-South relations.

## **2. THEORIES OF THE GLOBAL SYSTEM**

From the viewpoint of the theorists of this arena, imperialism is a set of economic development and political domination that is being applied by some of the center countries in the peripheral territories. There are various political, economic, and sociological views on the causes of the emergence of the new imperialism in this regard, and each of them has provided their own evidence. One of the imperialist theorists, Elahi (2010), has presented a structural design in this regard. He believes that imperialism is a relationship between the center and the periphery. Elahi (2010) divides the center-periphery into two parts of the axis/center and periphery (Figure below).



The continuity line between the center-periphery is a sign of convergence in the relation. The cut-off lines between the center-center, periphery-center, center-periphery, periphery-periphery, as well as the periphery-center, and periphery-periphery represent the heterogeneity of the relationship. In fact, the above figure represents the general structure of imperialism. The convergence conveys sharing in the productive, financial, and service benefits that exist between the axes, either within the framework of the industrial countries or the third world nations.

In another part of his discussion, Elahi (2010) deals with various functions of imperialism and collectively divides it into five types: economic, political, military, communicative, and cultural. His purpose of economic imperialism is the exploitation of natural resources and raw materials in the periphery by the center that takes place during unequal exchanges and benefits the primary winner, the center. The political imperialism aims to make decisions by the center and the obedience of the periphery. This political principle is reinforcer/strengthener and complete of economic imperialism. Military imperialism represents instruments of support for the periphery existence and its destruction in the case of protest and

opposition, which in turn is complementary to political hegemony. Communication imperialism refers to the dominance of the center nations in cases such as news, information, and communication tools. Ultimately, cultural imperialism is related to education and cultural domination. The cultural imperialism has the most significant effect on the adaptation of the center internal situations to the periphery. These five principles of domination are related to each other and are in parallel (Sari Ol-Ghulam, 1992).

Wallerstein, for example, is another theorist in this area who has been following Elahi (2010) style and model, with the difference that he adds another side to the two-dimensional division of the global system.

In other words, Wallerstein divided the world system into three parts, unlike the other ideas (such as Frank and Amin, which divided the system into two parts): into core countries, semi-periphery countries, and the periphery countries. He argues that, since the 16th century, a new capitalist system was formed in the West, which gradually merged the entire world, up to the nineteenth century. This world system is based on a division of labor, unity and coherent system, and is divided into three distinct parts:

- 1) The center/core consists of countries where agricultural-industrial production is the most effective production method, economic activities are more sophisticated, and the capital is more accumulated. These classes of countries produce goods

that require the use of sophisticated technology and mechanized and "capital-intensive" methods. Central governments are the most powerful and organized governments. In Wallenstein's view, in much of the history of the world system (means until the nineteenth century), the center included a small number of Western European governments, but in the last/ current century, first, the United States and then Japan joined the core class (Reynolds, 1992).

2) The periphery includes those countries whose economic activities are simpler and often "labor-intensive." These countries produce raw materials and agricultural products. The center nations militarily and organizationally influence the governments of these countries. Most of the Asian, African and Latin American countries are classified in this group.

3) The semi-peripheral class is including countries where some of their economic activities are similar to the economic activities of the center, and some of which are similar to the economic activities of the periphery. The semi-peripheral-state governments have more independence from the core nations than the periphery governments. These countries, as intermediaries between the center and the periphery, play an essential role in the world system. Countries such as Argentina, Brazil, and Spain fall into this category (Saei, 2005).

In his opinion, the political foundation of the global system is an international class struggle. This class conflict, like a feudal system, has been formed in a hierarchical model that extends from the dominant classes level in the society of the center to the dominated classes in the peripheral communities (almost the same as the exploitation chains Frank believes). In his view, throughout the history of the world system (from the sixteenth century AD), the center's domination has taken on various forms. The most evident form of this domination has been the violent seizure of the peripheral areas and converting them to the colonies. In some other periods, or in some parts of the periphery, different countries of the center have sought to create and expand penetration areas, and in these regions have created their puppet states. Such peripheral states (puppet) have established close economic ties/relations with their supportive power (Holsti, 1975). Certain peripheral governments have not been the puppet of a particular power, but one or more powers have acted in such a way as to ensure that these governments are performing consistent policies with the survival of the peripheral exploitation main patterns. Further, the semi-peripheral states are, in fact, acting as regional allies of central governments. These governments have no interest in uniting with the periphery, although their interests are not entirely identical with the center governments. On the one hand, they are seeking to increase their domination over their peripheries, and on the other hand, they try to increase the independence of their actions against the central government (Saei, 2005).



### **3. THEORIES OF UNDERDEVELOPMENT**

These theories are a set of theories that address the characteristics of the newly independent Third World countries after the Second World War as the underdevelopment. The theoretical basis of these theories is based on the principle that the system of international capitalism economics regularly operates, which causes the underdevelopment and disturbance in the economies of the South countries. The way in which the international economy works is, naturally, to the detriment of those countries that do not have capital and trade inequalities with the industrial world (MagDoff and Camp, 1990).

As Andre Frank, a passionate supporter of the theory of underdevelopment says: "Development and underdevelopment are two sides of a coin." In his opinion, Western capitalism, which has gained world domination, on the one hand, has resulted in the development in the West, on the other hand, the underdevelopment in the East (South countries). In fact, the supreme world powers have marginalized the rest of the world (countries). Frank suggests that the only way to overcome underdevelopment is to entirely break contact from the world/global economy towards reaching a national development; but other scholars, instead of this theory (the underdevelopment theory), emphasize on the theory of interdependence that affirms the dependence on the West. Therefore, according to this theory, globalization also will lead to the unequal development and nothing else (Sweezy, 2001). However, in general, the theory of

underdevelopment (theories that convey the underlying cause of underdevelopment in the lack of the development in the South countries) can be divided into two broad parts: structural theory and dependency theory (Mommsen, 1997).

#### **4. STRUCTURAL THEORY**

This theory, presented in the 1950s, introduces the international capitalist economy that has become a monopoly, responsible for deepening inequalities. Although, in the nineteenth century, the exchange/trade was called the engine of growth and development, due to structural weaknesses in the Southern countries, the exchange between the industrial world and the Third World in the twentieth century would not have the result of the past. In fact, the international economic is divided into two parts of the center and the periphery, and in this system, technological development, which is one of the foundations of development, is exclusively in the center. Moreover, the technology is then transferred to the periphery to the extent that is contributing to the production of export goods (Ashouri, 2002).

To contend against the existing shortcomings, structural theorists have proposed the formation of international organizations such as the UNCTAD (United Nations Conference on Trade and Development), as well as the establishment of international policies and regulations for the stabilization of economic relations and exchange rates/prices. Also and more significant than the suggestions

mentioned above, these theorists have suggested rapid industrialization to overcome economic problems. In any case, the periphery needs to pursue the import substitution policy through supporting the domestic industries, foreign investments in commodity production, and establishing common markets with other third world countries. The primary purpose of these recommendations is to equalize the exchange conditions in order to appear the positive effects of this exchange through an increase of incomes, employment, internal market and general development (Sari Ol Ghalam, 1992).

## **5. THE THEORY OF DEPENDENCY**

The dependency school has grown from various disciplines of the social sciences and has focused on different countries from Latin America and other parts of the world. Indeed, with the rise of the economic problems of the Third World countries and the lack of improvement in their general situation, some of the theorists in the 1960s expressed various interpretations mainly under the title of dependency. According to Brazilian economist Dos Santos, the dependency implies a situation in which a system of economics is shaped by another development and expansion of another economics that it is dependent on. The relationship of interdependence is that a country (or countries) has the ability to develop and continue the development, and the other country (or other countries which are dependent) progress and develop exclusively in the light of the development of the first.

In general, the theories of dependence point to three variables in their analysis: 1) the nature and context of the international capitalist system; 2) the method of relationship and connection of capitalist and underdeveloped countries; 3) the internal characteristics of underdeveloped countries (Sari Ol Ghalam, 1992).

However, theorists of the dependency school, despite their various ideological and political orientations, and the different views and ideas about the three above mentioned variables, agree on the following fundamental principles and bases, in essence:

First, they regard the dependency as a very "general" process that is true of all the Third World countries. The goal of the dependency school is laying out the general pattern of dependency in the Third World throughout the history of capitalism since the sixteenth century onward.

Second, the dependence is referred to as an "external" state, that is, a situation imposed from the outside. According to this approach, therefore, the most important barriers to national development are not the lack or shortage of capital, professional and specialized proficiencies, and democratic institutions. But instead, these barriers must be sought outside the national economic domain, in the historical heritage of colonialism and the continuation of the unequal international division of labor (Ghavam, 2004).

Third, the dependency is often evaluated as an "economic" state. From these theorists' viewpoints, the dependence is formed as a result of the transfer of economic surplus from the Third World countries towards Western capitalist countries. Accordingly, the Third World countries generally suffer and lose from a decline in trade with Western countries (Seyyed Nourani, 2000).

Fourth, according to the idea of the theorists in this school, the dependency is considered as part of the "polarization of regions" in the global economy. This is because, on the one hand, the outflow of economic surplus from the third world countries has led to their underdevelopment and, on the other side, the inflow of the same economic surplus results in the benefits of the development process in the West. Thus, as Andre Guandal Frank emphasizes, the underdevelopment in the periphery and the development in the center, form two different aspects of a single accumulation of capital that leads to the emergence of polarization between the regions of the global economy (Alvin, 2009).

Finally, the dependency school believes that a more significant contact with the center countries leads to a loss for the peripheral countries. In fact, the school of dependence states that till now the periphery has had and still has "a lot of damaging and disadvantageous relationships with the center." In other words, the political economy of the periphery, from the period of colonialism, was organized in such a way that cut off ties with the countries of the center. Instead of relying on foreign aid and foreign technology, they should choose a native

development or self-reliance model based on their own resources and design their own specific development paths in order to achieve independence and national development. Of course, in the context of the dependency school, self-reliance does not mean complete isolation from other countries, but only means that the peripheral countries should not be dominated by the center countries. They have to deal/trade with other peripheral countries on the basis of equal conditions and mutual interests. On the other side, from the perspective of this school, it is doubtful that the traditional elites of the peripheral countries would approve the complete breakdown of relations with the countries of the center and their multinational corporations. The link between the interests of the elites as mentioned earlier and the foreigners is more than enough to be able to choose such way. Therefore, according to many scholars in this approach, a socialist revolution may need to overcome the barrier of these ruling elites (Saei, 2006).

However, on the other hand, the efforts done to reach advancement and development in the South countries have also failed.

## **6. CONCLUSION**

In short, according to the above discussion, and from the point of view of the underdevelopment school, it can be said that the applied methods have been defeated in the development of the backward/undeveloped countries of the third world in various

dimensions. Because in the international economic arrangement, the third world has always been given the margin position and the commands and guidelines issued for progress either have been in a perfunctory manner or downright misleading. Although some countries have made a little progress, still some significant problems remain, such as inequalities, global poverty and declining living standards and many of these countries are in a high vulnerability position (Bayan, 1998).

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