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Policy Innovations from the Global South

Will The North Ever Learn?

Edited by
Achim Kemmerling
Hasnain Bokhari
Luicy Pedroza

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Editors

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Praise for *Policy Innovations from the Global South*

“For years, debates on policy transfer, diffusion, and circulation emphasized how governments in the Global North learn from one another, or how countries in the Global South adopt those lessons. This book sheds light on a different reality: it brings together cases of policy learning from the South while critically examining the dynamics of power asymmetries. It is a must read for anyone interested in how new policy ideas emerge and circulate across borders.”

—Osmany

“This book is pathbreaking in provoking a reorientation in our thinking about the ‘best’ in knowledge creation that informs policy practice. While wars, geopolitics and economic crises capture public attention and draw focus to the West or Global North, the policy experiments and governance innovations to meet the long-term structural challenges of development and growth that are surging ahead in the Global South often go unnoticed. The authors within this volume make a clear case for so much that can be learnt and adopted from overlooked countries and contexts. This book compels us to change our mindset to recognise and understand the power dynamics behind this scholarly neglect as well as to appreciate the wealth of insight and depth of experience in the Global East and Global South.”

—Diane Stone

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PART I

Introduction



CHAPTER 1

Introduction: The Global South, East, North: Asymmetries in International Policy Learning and Transfer

Achim Kemmerling, Luicy Pedroza, and Hasnain Bokhari

Nothing important can come from the South ... The axis of history starts in Moscow, goes to Bonn, crosses over to Washington, and then goes to Tokyo. What happens in the South is of no importance
Henry Kissinger (1969, quoted in Hurrell, 2015, p. 170)

From Henry Kissinger's quotation regarding the Global South to Donald Trump's disparaging remark about African countries, many countries in the Global South/ Global East (GS/GE) continue to be viewed with disdain in the Global North (GN). It is often alleged that they contribute solely to problems, rather than offering solutions. Should they be deemed

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sources of inspiration, such inspirations are considered valuable primarily for other countries in the GS/GE. Remarkably, academics are not exempt from this attitude. Even in scholarly debates about international policy learning, diffusion, and transfer, GS/GE to GN is the one geographic direction that is seldom studied.

Of course, this literature evolves. Initially, it focused on countries of relatively similar status, mainly in the GN (e.g., Collier & Messick, 1975). Then it shifted to diffusion and transfers from the GN to the GS/GE (e.g., Simmons et al., 2006). In recent years, scholars have become increasingly interested in South-to-South policy learning (e.g., Grimm et al., 2019; Porto de Oliveira et al., 2020; Stone et al., 2020). However, with very rare exceptions (see, e.g., Kemmerling, 2023), we seldom discuss policy innovations and practices that travel from the GS/GE to the GN.

Is this because such learning does not happen, or rather that we do not give credit where it is due? This book shows that it is a mixture of both. South-North learning is sometimes rejected, despite the clarity of some lessons, and oftentimes it is distorted and made invisible. Even when learning occurs, it is rarely acknowledged. This lack of explicit and clear recognition not only creates biased assessments of the potential for policy change and innovation in the GS/GE but can also lead to policy failure, policy volatility, and a reinforcement of negative stereotypes and condescension.

Our volume joins rising and multiplying calls for the democratisation of social science and knowledge production, but emphasises the costs of dismissing contributions and innovations for policymaking in the GN. We summarise findings from 14 different policy areas, from all regions of the GS/GE. We document cases of missed learning opportunities, concealed or distorted policy learning, as well as the negative consequences of these practices. Moreover, our volume not only reverses the perspective on global policy learning but also gives voice to scholars and debates who are rarely heard in centres of knowledge production in the GN. As Brun (2023, p. 3) has stated, “it is the height of irony that much of the debate on the Global South de facto excludes most authors from it.”

In the following sections of this introduction, we begin by clarifying our definitions of GN, GS, and GE. We then examine succinctly the recent research on policy diffusion and transfer. Afterward, we consider the distinct challenges that arise when learning is directed toward the GN, emphasizing the need for alternative methodological approaches to policy

transfer. Finally, we conclude by summarizing our fourteen contributions.

OUR TAKE ON NOTIONS OF THE GLOBAL SOUTH(S) AND EAST(S)

Concepts such as “Third World” or “Global South(s)” are controversial yet enduring. Scholars and activists alike have made strides to propose alternatives with more positive connotations, from “rising powers,” “emerging markets,” or some more historically rooted ones such as the “non-aligned” (Escobar, 2011; Prashad, 2012). There appears to be a need for such categories (Connell, 2007), and yet it may be hopeless to aspire to find a category immune to criticism that still conveys the connotations we are after. To wit, our aim in the search for a concept is double: we want it to denote the “majority world” (Alam, 2008)—that is, where the lion’s share of the world population lives and moves, and we want it to reflect the power dynamics by which a minority of rich countries hold the prerogative to determine which kinds of (policy) knowledge are worthy and how to use them. Our canvassing of policies in this book echoes that second, more profound connotation: what kind of actors we consider legitimate sources of knowledge is part and parcel of global inequality.

Having considered the above-mentioned alternatives, these two connotations brought us to the much-criticised concept of the Global South. Dados and Connell (2012) view the shift from those categories to the Global South as a transition from approaches centred on cultural difference or levels of development to an emphasis on geopolitical relations of power. Other scholars have proposed further refinements to emphasise not just asymmetries of power, but also diversity, agency and self-reliance (Oberda-Monkiewicz, 2024): from the “Global Souths” to the “self-designated South” (Brun, 2023), the “geopolitical South” (Milani & Kraychete, 2022) or “relational South” (Ferabolli, 2021).

As it is obvious, the concept of the GS refers simultaneously to a (fuzzy) denomination of geographies, a descriptor of a high proportion of states in the international system; but more than anything, a characterisation of the weaker parts in the unequal distribution of global resources, capacities and historical and cultural trajectories; an identity and, last but not least, a political-discursive resource. It is in that last sense that we prioritise the use

of the Global South in this book. We follow both Mahler (2015), who emphasises the use of the Global South to emphasise antihegemonic frames and resistance, and Brun (2023), who even suggests using it as a label, which allows diverse actors of the GS to claim agency in how they use and understand their belonging to that category. Haug et al. (2021) go a bit further and turn the frame of the antihegemonic into a gerund: “the ‘Global South’ *framing* can serve the purpose of acknowledging actors and spaces that have long been neglected by mainstream social science research” (p. 1926). In this understanding, using the GS is a tool for shining light on how active neglect of a big portion of reality occurs in today’s world.

Moreover, using the GS as framing allows us not only to denounce global power asymmetries but also to observe a diverse range of actors developing policies from that disadvantaged position. It is essential to note that these actors are sometimes found in areas of the world that would not typically be considered part of the Global South.¹ A prime example can be found in scholarship from and about the post-communist world, for which the suggestion of the term “Global East” has arisen (e.g., Müller, 2020). Indeed, that space shares a rather unique historical legacy. Yet, what these countries in it—except Russia, perhaps—share is, as well, similar asymmetries in power, wealth, and international recognition. Hence, in this edited volume, we will use the term GS incorporating the GE to highlight the kinds of obstacles that policy learning faces when it arises from those countries (or even regions and spaces within countries of the GN). While historical context matters for differentiating various GS(s) and the GE, their status in the chain of successfully transmitting information and thereby influencing other countries’ behaviour may well be similar.

Thus, our definition acknowledges the heterogeneity of the concept and considers it an advantage that it is increasingly understood as a relational category that emphasises power asymmetry, but also opens space for different claims on the GN. Yet, categories such as GS/GE have often been criticised for reifying clichés and exhibiting a paternalistic or even condescending gaze on people living in those countries. While such risk clearly exists, in this volume, with its multiple and very diverse contributions, we want to emphasise instead a bridging potential, grounded in a

¹Also, –as it should be obvious, but nevertheless bears clarifying– these actors are not only States, but can also be subnational and transnational communities.

growing sense of a (co-)responsibility. This co-responsibility renders the observation of neglect productive, and not purely denunciatory.

Let us explain a bit further how we think of such productive potential. Academics, governments, and people in the GN should take—and often do take—an interest in the GS because they understand that their privilege and historically anchored standing carry a responsibility. In this regard, the Brandt Report of 1980 was a pioneer, suggesting that the North-South divide was equivalent to the divisions of rich and poor, or developed and developing. As editors, we share this notion of co-responsibility, but we also want to appeal to more selfish senses in the GN. As the examples in our book demonstrate, richer countries miss out on numerous learning opportunities that, in the face of dire global challenges, should be worth pursuing.

Thus, our choice of concept for the GS/GN divide reflects our shared belief that there is an unequal politics of international policy learning that needs to be addressed. As empirical studies have repeatedly shown (e.g., Collyer, 2018), only scholars with resources can speak. Scholars working on epistemic injustice have demonstrated significant biases in knowledge creation, both within the decolonial canon (e.g., Dussel, Escobar, or Quijano) and at times even beyond and against it (e.g., Rivera Cusicanqui or Spivak). Knowledge produced in universities and research centres spreads to governmental and nongovernmental institutions through “communities of practice” (Vessuri, 2015), including those that aim at social intervention and policies. This leads not only to academic “monocultures,” with limited potential for creativity, but to an “epistemological domination relied, not only on the imposition of specific ways of explaining and understanding the world, but also the rejection of other alternative ways of doing it” (Efron, 2020, p. 41).

Our contributions illustrate different ways to sensitise “normal sciences” such as Western political science, public policy, and related areas against biases, neglect, and active silencing. Some of our contributions, for instance, demonstrate that biases against South-North policy learning also create biases in methodology. It is challenging to present cases of concealed policy learning or the strategic muffling of existing evidence of good policies from the GS. A government in the GN may rarely acknowledge the source of learning originating in the GS and get away with it due to a lack of traceability. This creates an asymmetry not only in the actual policy transfer but also in the observation and observability of that transfer.

IS SOUTH-NORTH POLICY LEARNING DIFFERENT?

In this edited volume, we examine instances of international policy learning, transfer, and diffusion. Learning is perhaps the most open term, signifying that information from one country somehow influenced learning in another country. Diffusion is a more neutral term, allowing for various mechanisms from naïve emulation to rational forms of learning. Transfer (and adoption) usually refers to the actual import of a policy or innovation from one country to another. In the volume we will use all three terms, sometimes interchangeably.

The literature on international policy learning has evolved tremendously in the last few decades (for overviews, see e.g., Dunlop & Radaelli, 2013; Blatter et al., 2021). Earlier contributions tended to be rather structuralist and usually focused only on interactions between countries in the GN (e.g., Collier & Messick, 1975). Soon, however, scholars became interested in the export of norms and the disciplinary function of international organisations (e.g., Meseguer, 2005) as well as simple power asymmetries that lead to policy diffusion from North to South (e.g., Dobbin et al., 2007). Classic examples are IMF conditionality or the (sometimes not so) soft power of the European Union (e.g., Kemmerling, 2010). More recently, scholars have noted lateral forms of diffusion between countries in the GS (e.g., Porto de Oliveira et al., 2020), such as the spread of innovations like cash transfers or microfinance. It is also increasingly evident that the life cycle of policies can be much more complex, flowing in different directions and often returning to hosts, with several intermediaries in between (Stone et al., 2020). Flows from the South (or East) to the North are deemed rare though (*ibid.*, p. 12) and are rarely discussed in the literature.

Indeed, several hurdles or obstacles make it more difficult for countries in the GS/GE to be not just recipients but also senders of policy lessons (see Kemmerling, 2023). Three major asymmetries come to mind: asymmetries in resources and power, asymmetries in legitimacy, and asymmetries in authority. For instance, countries in the GN often possess an infrastructure of dissemination (research foundations, cultural institutes, chambers of commerce, etc.) that promote essential practices worldwide. Countries in the GN can also spread norms and practices through their influence on international organisations, which often leads to an indirect

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