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The performative Global South  
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## The performative Global South in Mallorca: On othering in practice and theory

**Nina Schneider**

University of Cologne

*nina.schneider@uni-koeln.de*

### **1. Introduction: Chasing the Global South**

In September 2016, an interdisciplinary group of researchers from the University of Cologne traveled to Mallorca with the goal to study the Global South in a major European/German tourist region.<sup>1</sup> More precisely, the aim was to study how people from the Global South – Senegal, Nigeria, Brazil – live and work in the

mostly informal service sector in this popular Mallorca tourist region, and how they are being treated by the tourists, who are mostly Germans. Street vendors, for example, and Nigerian cleaning ladies would be the imagined object of study. As our funding allowed us to conduct research for two and a half days, the group needed to use our time very efficiently to come up with relevant research results. So far so good.

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<sup>1</sup> Quotation marks can highlight the constructed and problematic nature of concepts like "Global South" or "Third World". Still, I have deliberately avoided them to facilitate the reading.

When I arrived at the beach, however, I very soon started to feel uncomfortable. Trying to engage with any kind of Southern looking person – street vendors of colour, for example – turned out to be a highly unpleasant activity, especially, because these street vendors would shy away from us and would certainly not tell us about their personal lives. If they spoke to us at all (other than trying to sell their sunglasses), they would invent themselves. Most of them, I assumed, lacked papers and time was too short to win their trust. And who *was I* that they would open up to me.

In my unease, I first noted the absurdity of the research quest *viscerally* and then consciously. Searching for whatever Southern I could find meant nothing else than constantly othering cultural/social/national groups (like the Senegalese street vendors), and *objectifying* them. Who exactly were Southerners and what was the Global South? Was the Global South equivalent to people from the formerly Third World countries or developing regions – Africa, Asia or Latin America? Was not a geographical definition of the Global South an out-dated, simplistic and highly biased conception, reiterating much of the criticism levelled against the Third World concept (Dirlik 2004, 2007; Escobar 1995; Figueira 2007)? Under time pressure, it seemed that this was our quest: to hunt down and study a Global South without knowing, what it was. To study a subject while still



Figure 1:  
The South.  
(N. Schneider)

exploring what the object (the Global South) was.

The project was getting more and more interesting. The conundrum raised a series of vital questions: How do you possibly avoid finding the very Global South that you had set out to study in the first place? How to avoid tautologies and conduct “proper” research instead (find new results rather than your pre-conceptions)? Very soon I realised that our task was first to identify and deconstruct our own biases and imaginary of the Global South, and importantly, the biases and misrepresentations caused by the conventional research methods and practices indoctrinated through our respective disciplinary training. Rather than studying some kind of Global South, the research journey shifted towards a new project: researching and research on our object of study.

This essay uses this hands-on episode from the field – my inner dilemma at Mallorca

and the haunting questions about what constituted the Global South – to reflect upon the value of a Global South model as *performative*. A performative, not fixed understanding of the Global South seems to be a helpful tool to think through the theoretical questions involved in the process of defining one's research object. Performative here is understood in the sense of relational, shape-shifting, malleable, polyvalent, not fixed. If the meaning of the Global South is not determined initially (as else everyone would reproduce our imaginary South rather than truly studying it), it is vital to ask: what are the benefits and downsides of a Global South model that it is not static but performative (or relational)?<sup>2</sup> Exploring to what extent an unfixed Global South would solve problems of previous terms, what may a performative Global South concept look like? What are possible benefits and downsides of a performative Global South? And, lastly, what would it mean in practical terms – is it at all feasible to operate with such a model? Would it be possible find adequate media or an intellectual form for that kind of knowledge production? And, ultimately, would it fit into contemporary disciplinary designs, customs, and conventions?

To answer these questions, the article starts by discussing different definitions of the Global South including the *performative* Global South. Drawing upon Southern Theory and more traditional in-between concepts like Fernando Ortiz' transculturation and Homi

K. Bhabha's third space, the article then discusses the benefits and challenges of a performative Global South concept. I conclude with the obvious (my apologies): there is no simple answer. Yet, I also conclude, and that is important, that the Global South just serves as one example; reflecting upon the construction of our very research objects *continues* to be a fundamental and unresolved challenge that requires further study and attention. It affects the very disciplinary fundamentals, methods and historically entrenched conventions many of us all too often thoughtlessly operate with.

## 2. Conceptualising the Global South at Mallorca

Before addressing the performative South, it is useful to first revisit the very emergence along with the current usages of the term Global South. While the term Global South has been increasingly invoked as a less pejorative substitute for Third World or underdeveloped countries, it continues being attributed with highly diverse meanings. Surprisingly few publications offer a detailed definition. Historically, the term South rose during the 1970s as a result of the Asian-African alignment policies, the Bandung Conference (1955) and the Group of 77 (1964) (Butler 2008: 453). In the aftermath of the peak of third wave of decolonization in the second half of the twentieth century, the term was initially associated with a fairer

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<sup>2</sup> Critics may insist that there is a difference between a relational Global South concept, on one hand, and a performative, on the other. To facilitate my argument I audaciously treat them as synonyms. I admit that this may require some further reflection at a later stage given that the term performative invokes a much stronger agency of the viewer's gaze, while relational may just refer to different objects of study in relation to one another.

world order. While the precise origins of the twin term remain unknown, the term *Global South* has increasingly been invoked since the late 1990s/the new millenium, reflecting general trends and discourses about globalisation as well as a rising importance of South-South trade. Currently, three main definitions continue to coexist in the scholarly and political discourse (Schneider 2016): a geographical understanding that locates the Global South in those world regions formerly constituted by the Third World. Conceived of as structurally underdeveloped and poverty-struck, the geographical Global South includes Latin America, Africa, and Asia. A second and conceivably class-based definition of the Global South relates to the *subalterns* across the globe – human beings disadvantaged by neoliberal policies and socially, politically, and intellectually disempowered (López 2007). These Southerners are global because they can no longer be confined to a single region, but they exist in Calcutta as much as in New York City.

The third conceptualization, and most important for our reflections here, reads the Global South as a *flexible metaphor* that defies any geographical or social/class fixation but is *relational*. This third reading marks a metaphorical yet locally applicable dividing line between a supposed powerful North and a deprived and dependent South. To provide an example, it could be related to the border line between Northern and Southern Italy. The geographical definition remains dominant in contemporary discourse – most dictionary entries like Butler's (2008), the United Nations (UN) rhetoric, and scholarly journals like *Bandung: Journal of the Global South* (Wong 2016) use this concept. Still, it has increasingly been criticised by scholars,

particularly by intellectuals from the South.

Systematic discussions on the downsides of a relational Global South remain scarce, yet it is useful to summarise the justifications of this model's proponents. Objecting a *geographical* North/South divide, McEwan (2009: 13) argues: "it is most useful to think of North/South as a *metaphorical* [...] distinction" for several reasons: it lacks a 'magical cut-off point' between 'developing' and 'developed' nations; it can account for societies' 'dynamism' (e.g. rising China) and internal inequalities; and finally, a metaphorical model transgresses narrow socio-economic practices of marginalisation. Instead it includes the political, cultural, and epistemic sphere. Another advocat of a Global South as a 'concept-metaphor' is Matthew Sparke (2007: 117), in whose parlance the Global South is "everywhere, but always somewhere". The concept of the Global South 'map[s] back' (or reterritorialises) humanity thus resisting a geography that serves as a means of control and domination (Sparke 2007: 118). Levander and Mignolo (2011) similarly regard the Global South not as 'an existing identity', but a 'metaphor' (they refer to the "metaphor of the global south"), even though they explain to be more interested in investigating *who* speaks about the South and *why* rather than in its proper definition. Levander and Mignolo's refusal to define the Global South may be read as yet another ludic form of sabotage of a new, rigid ordering system.

The current chief editor of the journal *The Global South*, Leigh Anne Duck (2015), regards the (geographical) imprecision of Global South not as a weakness, but even as a strength. This vagueness, she holds, 'energizes' scholars more than a compartmentalised and quanti-

fied approach based on a clearly defined and located Global South. Duck (2015) argues that the merit of the Global South metaphor lies precisely in its potential to analyse local and joint resistance against "exploitation and hegemonic economic and political [impositions]".

Returning for an instant back to our practical problem of researching the Global South in a Mallorca tourist region, the problem the research group was facing was that language and categories were based on divisions; divisions that "can be constructed and named" (Storch et al. 2017: 13). Borders could run along various lines: nationality, gender, skin-colour, social acquisition power – many variations were possible. The artist and activist Jimmie Durham (2015: 122) reminds us of the absurdity of making such divisions, as they ultimately tend to be arbitrary and defensive fantasies of the beholder (e.g. how Europe constructs its borders). Recognising the absurdity helps to systematically study and interrogate the processes of division-making. A similar intervention was made by Boaventura Santos (2007) in his critical essay on abyssal or border-thinking. Border thinking, Santos claims (2007: 1), continues to mark modern Western thinking and hence require a "gigantic decentring effort". Santos (2007: 1) also links the struggle for social justice with a quest for "global cognitive justice", and calls for a "new kind of [...] post-abyssal thinking".

It is important to place the arguments in favour of a relational or performative Global South in their intellectual and historical context. Although Santos' border thinking (dialoguing with decolonial theory from Latin America) and what is now called Southern Theory (a school

branded by Raewyn Connell which broadly speaking refers to studying intellectuals from the South and opening the canon) are distinct projects with different roots and emphases, they share some key characteristics.

They respond to an unease of long-standing epistemic, political and cultural domination by Western countries that has increasingly been criticised since the 1980/1990s by nearly all disciplines. In the next section I will therefore revisit familiar concepts from Southern Theory studies and from Latin American and Asian critics, as they may help to highlight the danger of fixed ordering practices in the field of knowledge production, and provide helpful insights for the Mallorca case.

One recent intellectual school that has been promoting 'new knowledge projects' or kinds of learning (or unlearning) is associated with the so-called Southern Theory (Connell 2014: 210). It opposes the controlling, hierarchising, and policing of knowledge and invites to experiment with new forms of knowledge production. Defying continuing structures of "colonial" (or imperial) knowledge practices, these scholars have embarked on a search for better ways to produce knowledge, fresh knowledge that incorporates rather than silences less powerful voices and forms of knowledge.

Southern Theory, however, has not been the first attempt to destabilise clear-cut, potentially unscientific, and biased knowledge systems and hierarchies. In fact, to the very opposite: it returns to old or traditional knowledge from non-Western academic traditions, which simply have not been consumed but

ignored by the Western canon. Traditional disruptive and self-critical knowledge traditions and concepts can be found in all cultures and at all times, and particularly among non-Western intellectuals. More recent non-Western variants include the Cuban intellectual Fernando Ortiz (1995) and his concept of *transculturación* (a concept since developed by intellectuals like Julio Ortega, e.g. 2003; 2017), the work of Anibal Quijano (1981), and more recently Homi K. Bhabha's (2004: 55) notion of the third space – to name but a few.

Conceptual origins and small distinctions apart, an important difference of the newer notions involves that they made it into mainstream Western canons, with the turn against Eurocentrism and the rise of postcolonial theory and subsequent intellectual schools (e.g. Said 2003 [1978]; Chakrabarty 2000; and many others). What all of these notions share is a privileged non-precision which in turn serves to disempower and challenge specific dominant forms of knowledge and knowledge production. Pondering about the value of a performative Global South concept, many arguments from Southern Theory and diverse inbetween-categories (Ortiz 1995, Santos 2007, Bhabha 2004) equally apply.

### **3. Benefits and challenges of the performative Global South**

The benefit of an unprescribed, relational, and performative Global South may lie in its subversive potential to undermine and disrupt hierarchies, and potentially create alter-

native ones. It allows for discarding taken-for-granted knowledge (including conventions, imagined geographies, and stereotypes), questioning such knowledge (or bias/imaginaries), and contributing to new research findings and kinds of knowledge. Such imprecision may obstruct walls (Ortega 2017) and border thinking (Santos 2007).

The challenges of this disruption technique, however, loom large. Let's use our example – the performative Global South – to truly think through these inbetween/non-fixed/malleable categories. It, first, presupposes that fresh and true research necessarily contradicts disciplinary and scholarly conventions; a conclusion that seems impossible to put into practice in the current academic systems. This new kind of self-critical research demands exactly the opposite of what most of us were taught was "scientific" (and what I came with to Mallorca): namely clear and exact definitions of terms and categories rather than relational, performative concepts; clear measurable and at least temporary infinite conclusions rather than shades of grey and maybes; and a different role of the scholar – the scholar as a self-critical and cognizant co-constructor of knowledge rather than an unquestioned, at times narcissistically acting authority. (Although beyond scope here, critics may also argue that it paves the way for relativism or even nihilism in a so-called post-factual world.)

An important and related question concerns the form of the research output. If the Global South is relational and performative, how can one mediate and materialize that very flexibility? While contemporary academic careers are built on highly ranked peer-re-

viewed journal articles, our Mallorca research group ultimately published an essayistic catalogue with many pictures, and, more importantly, curated an exhibition.<sup>3</sup> If the actual topic was to foreshadow the very construction and deconstruction of the malleable Global South, it would work only in form of an exhibit where the viewers would themselves be invited to critically ponder about the meaning of the Global South. The exhibit (art) was the only means to represent not only the malleability of the unfixed Global South, but to make the viewer experience the very process of constructing and deconstructing categories and become cognisant of their own prescribed ideas and imaginaries. It was not just an object to be gazed at, but the viewers were invited to construct and deconstruct the Global South for themselves. The exhibition was the only medium possible to make the viewer relive what we as researchers had gone through when embarking on our search for the Global South in a Mallorcan tourist region.

Disciplinary conventions and genres apart, two further problems remained. For one, my original goal (and the outcome expected from my academic institution, perhaps) was to study the Global South (our research object) and not my own imaginaries of the Global South. (Other members of my group, by contrast, were interested in their own imaginaries of the Global South.) If any kind of research would end up in a mere research of my own biases, all academic production could be criticised for being highly narcissistic. The

Mallorca episode thus left in the open a fundamental question: how can one reconcile a self-reflective and critical approach with a study of the research object itself in a productive (outcome), epistemically egalitarian manner, and of highest quality in terms of our research findings (least biased and prescribed by stereotypes)? A double movement seems to be needed. First, scholars objectify the research topic (in my case the Global South, at least in form of a working definition). Yet, at the same time they must deconstruct their own biased preconceptions of the Global South.

A last disadvantage of a performative Global South model relates to the need of concrete definitions, when we need to combat different kinds of discrimination (class, race, gender, ethnicity, age, citizenship). To show the downsides of malleable, non-fixed, in-between concepts (like the performative Global South), I would like to briefly draw on the long-standing Brazilian scholarship on racism. This scholarship suggests that specific categories are needed that *other* our study objects (such as the Global South), terms that necessarily ascribe certain qualifiers to groups and people beforehand. One could, for instance, decide to censor and avoid all the classifiers that categorise, hierarchise, and attribute identity markers to others. Let us pursue this thought for a moment and see where it leads us to. Often discussed over the last two decades, this practice would attempt not to other the *Other* (or object of study). In our case, it would mean that one no longer talks about the Global South/North.

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<sup>3</sup> The exhibition catalogue includes numerous pictures from the research expedition: see Storch et al. (2017). *Normaliminalities: Artefacts from various Souths and Norths, The Mouth 1*. It is also available online at: <https://themouthjournal.com/issue-no-1/> (accessed October 22, 2017).



Another example would be to avoid the terms white-skinned/person of colour or female/masculine, etc. Boycotting this terminology would prevent the reproduction of dichotomical thought/ordering that fails to reflect reality (because it is a simplification/construction/distortion). Boycotting the dichotomic jargon would also allow to explore the relational and constructed nature of the concept/object including our own prescriptions. Theoretically then, boycotting dichotomical terms seems to be a convincing approach.

Yet, practice has shown that despite the good intentions the deliberate *eliminating* of these social markers has the opposite effect: rather than denouncing and sabotaging unjust knowledge/power/socio-economic hierarchies, they silence the very violence experienced in society and reflected in, paradoxically, such problematic categorisations and ordering systems. For example, if we aspire for gender and racial equality, we will not contribute to equality, if we simply negate gender and skin colour ascriptions and treat them all as equal on a discursive level. Let me illustrate this with the debate on racism in Brazil. If we stop distinguishing between dark and light skinned Brazilians, because we are egalitarian-minded and think that race does not matter and is arbitrarily ascribed to humans – if we stop *othering* through language according to skin tones (black and white) – the result is not a society free from racism, as numerous scholars have shown (Maggie 1994, Winant 1992, and many others). Instead, racism continues in real life, yet is being silenced and obscured in the discourse. Hence: racism can no longer be denounced through language. The same applies to gender. If we aspire for gender equality, the solution is

not to negate the differences and pretend we are all one mankind. Contemporary figures on gender inequality are abundant. In her critical work on globalisation, for one, Saskia Sassen (1998: xxi), has famously shown that women, people of colour, and migrants are disproportionately disadvantaged by the labour market. In fact, eliminating racial and gender categories (among others) would play precisely into the hands of the racists and patriarchs whose control, dominance, and exploitation would be obscured rather than uncovered and denounced. This, in turn, leads to the conclusion that paradoxically one needs to *other*, if the goal is to contribute towards both a more egalitarian production of knowledge and one of higher quality (less biased and closer to “reality”, which in turn might be constructed as well). The vision may involve to find a solution between the poles: Neither to disabandon clear categories, nor to allow that clear categories sustain oppressive ordering systems like it has been the case, for instance, under colonial rule.

#### 4. Concluding remarks

At the end of this article, I conclude that the performative Global South has its merits (especially theoretically), yet simultaneously its conceptual, methodological, and practical downsides. The exhibition turned out to be the ideal means to present our research findings, because it invited the viewer to recognise and experience the very process of constructing the object of study/the Other (in our case the Global South).

The Peruvian born literature professor and accomplished novelist Ortega (2017) holds

that language always sets limits and creates walls, and that the solution to the limits set by language is art. Applied to academic forms of producing knowledge (one that always rests on language), it means that research may always create walls, while, on the other hand, it may also help to deconstruct walls. This links to interventions by other intellectuals from the South. Within the strongly policed academic system, a system characterised by complex practices of gatekeeping, an important part of the scholar as engaged intellectual must be, as Ciraj Rassool (2017) for example holds, to challenge the very disciplinary conventions and institutions. Any other merely discursive or cosmetic promises towards less Eurocentric and more inclusive productions of knowledge will else fail, if the very process of producing knowledge is not self-critically being interrogated. In turn, this means that we need new terms, new languages, and new categories to build a new and more egalitarian kind of knowledge. As the Brazilian debate on race has shown, fixed categories are needed for emancipatory struggles and resistance to racism, class, gender, and sex discrimination.

When arriving at Mallorca, our research group discussed a working definition of the Global South, after all the project sought to study the Global South at a Mallorca tourist region. The low-cost service sector was mostly run by Senegalese and Nigerians, all of them persons of colour and most from precisely the regions ascribed to the meanwhile objected geographical definition of the Global South (Africa, Asia, Latin America). Many of the African workers had no legal papers. While some of the tourist workers also lived in the surrounding areas, many lived in a ghetto-like

neighbourhood far from the tourists – Son Gotleu, a remote, multi-cultural neighbourhood (see Storch et al. 2017), that I remember smelling like pee and full of litter, yet functioning as a normal, peaceful community with little bakeries, cafeterias, and African hairdressers.

The Global South I could not define but had been looking for (at least initially and tasked by my academic research project) did not seem to exist at Mallorca. Rather it had many context-specific meanings, and led me to reconsider the performative Global South model (unfixed, malleable). Yet, reconsidering both the practical and theoretical benefits and disadvantages of the performative model (and performative categories at large), I was left in doubt on how to reconcile the discursive Global South (as language or imaginary) and the Global South I had witnessed as a real life experience during our two-day visit (real life experience). While I rejected the geographical Global South (the Global South as Africa, Asia, and Latin America) as prescribed and biased, reality seemed to be that a large number of the service workers was not European. Again, in order to pinpoint discrimination, it seemed clear categories were needed just as Brazilian race theory had shown. Another problem was that even if one opted for that performative model, a completely malleable Global South could never be studied academically.

The journey hence continues. Yet, importantly, the Global South as an object of study was just one example. Research objects at large – any othered object – raises fundamental questions about our role as engaged intellectuals, questions that delve deeply into the very nature of knowledge production.

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