

# Latin American Marxisms in Context



# Latin American Marxisms in Context:

*Past and Present*

Edited by

Peter Baker, Irina Feldman, Mike Geddes,  
Felipe Lagos and Roberto Pareja

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and Roberto Pareja

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We are grateful to the authors and the different co-editors who, in their own way and at different times, held this project together and kept it alive. The book – like the spirit of communism itself according to Marx in the *Communist Manifesto* – is an untimely spectre composed of fragments of different spaces, times, and people; all of them have left their mark on this final outcome. It is now down to the readers to decide whether those spaces and times will have been worth it.

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# INTRODUCTION

## **Marxism and Latin America**

In recent decades, the global North has been engulfed by neoliberalism. Neoliberal ideas have dominated the economy and public policies, and have become deeply entrenched as “common sense.” Since neoliberalization is a worldwide process, Latin America has not been immune to this trend. However, at the same time, governments and popular mobilizations across the continent have actively resisted and challenged neoliberalism. Countries such as Venezuela and Bolivia have sometimes been grouped under the label of a “pink tide,” denoting their leftist alignment. But opposition to neoliberal development patterns in Latin America has gone beyond social-democratic reformism to a revival of Marxist theoretical perspectives and political practices. This revitalization has included not only a renewed boom of Marxism and radical thought in scholarly spaces, but also the penetration of Marxist ideas into counter-hegemonic projects, be it in the form of mass mobilizations of subaltern populations or state policies and practices.

After the long night of military dictatorships and its aftermath of neoliberal pathways to “transitioning to democracy,” in which anything related to Marxism was utterly discredited within academic and public debates alike, we suggest that the intellectual and sociopolitical aspects of Marxism’s re-emergence are intimately associated. Although a renaissance of Marxism has been a global phenomenon (importantly, because of the ongoing neoliberal crisis), in this book we argue that this trend has acquired particularly meaningful contours in Latin America. On the one hand, a significant number of conceptual contributions have been recently elaborated in order to settle accounts in Marxism’s history of attempts to implant or apply orthodoxy upon the region from outside. On the other, many of these contributions are rooted in current forms of resistance and organization against neoliberalism, giving rise to the emergence of new horizons for action.

With this conjuncture in mind, the present volume seeks to appraise the state of Marxism within Latin America, offering a space for critical interventions within the area of Marxist analysis, in which topics that are often addressed separately can be discussed conjointly, considering the effects of capital as comprising a totalizing process which affects all areas

of life. Cultural critique, for instance, is often absent from discussions in political sciences or political economy, and vice versa. By breaking with these rigid boundaries, this volume enables such connections to take place. In doing so, it advocates for the equal importance of political economy and cultural critique for thinking, in the present time, about the possibilities of a post-neoliberal, and perhaps even post-capitalist, future.

From these broad perspectives, the present collection addresses the following questions: What constitutes Latin American Marxism, if this coupling has any politically and theoretically concrete sense, historically and contemporarily? What are the contributions to Marxist theory made by Latin American thinkers? What Latin American experiences inspire the reflections that drive today's Marxists to renew their approaches, sometimes challenging the allegedly Marxist canon? Our book addresses these pressing questions, connecting historically grounded reflections to the recent developments in the region.

The book will be of primary interest to researchers and graduate and undergraduate students from the wide range of disciplines (from anthropology, geography, and sociology to economics, politics, public policy, and literary studies) working in the broad field of Latin American studies. However, given the global interest in the revival of radicalism in Latin America, it is likely to appeal to a wider audience beyond the continent, while it should be of interest to non-Marxist as well as Marxist scholars with interests in the range of topics discussed here, from development studies to cultural theory.

As the neoliberal crisis which opened up in 2007 still continues to shake the globe, it is increasingly exposing the hollowness of discourses about "neoliberalism with a human face," revealing instead capital's more rapaciously negative actualizations. In this context, the book explores the horizons of possibility for resistance to global neoliberal capitalism. The specific role of Marxism in this conjuncture is a question still to be answered, but this volume, we believe, shows that some of these answers are already in the making in the Latin American context.

## **The Structure of the Book**

Written by scholars working in the United Kingdom, the United States, Canada, France, and Latin America, the collection contains chapters by both established and emerging scholars across numerous disciplines, providing a broad range of perspectives on contemporary Marxism in Latin America that, to our knowledge, have not been provided in any similar publications, which are generally either single monographs or exclusively dedicated to

specific questions such as political economy, neo-extractivism, cultural critique, or intellectual history. While the contributions to this volume can be referred to on an individual basis, what unites these different pieces is a sustained effort to use empirical case studies or focusing on an individual thinker to reconsider key issues of Marxist theory, with implications beyond the specific cases studied.

The chapters in this volume cover a time-span from late-nineteenth to our early twenty-first century, offering historical depth to the recent developments in the sub-region. Geographically speaking, the book discusses a range of Latin American countries, namely Peru, Chile, Bolivia, and Cuba, in essays focused on specific countries, alongside other chapters that address their chosen problematic from a transnational or supranational perspective. Different sections of the book address three spheres of the public life – the economic, the political, and the cultural – thereby presenting a multi-dimensional perspective on Latin American Marxism.

In the first section on political economy, there are two chapters which focus on specific case studies – megaprojects and telecommunications – and another chapter which engages with the concept of capitalist accumulation in Marx's work. Mike Geddes's paper offers a comparative insight into the emerging study of megaprojects, and opposition to them. Infrastructure megaprojects are a crucial feature of the contemporary global economy for understanding the increasing geopolitical influence of China in the region, for example, but there are few studies which encompass the region as a whole. Carol Muñoz focuses on the recent developments in the Cuban telecommunications sector in order to study the transformation of the contemporary Cuban economy, as the state tries to find a balance between the socialist principles of state-planned economy and the necessity to acquire hard currency to support the government-supported sectors such as health and education. In Lorenzo Fusaro's paper, the issue of primitive accumulation in its relationship to dependency and the postcolonial space, a key issue since the popularization of world-systems theory in the 1990s, is reconsidered from the perspective of development in Latin America, contributing to ongoing debates around the theories of accumulation by dispossession and movement of capital in the context of "new imperialism" by authors such as David Harvey.

The second section on political life ("State, Space and Civil Society") is the largest of the three sections, and also deals with the subject from a diversity of perspectives. Britta Matthes's paper explores the tensions and limitations of the Bolivian "plurinational state," arguing that Marxist theory needs "stretching" to deal with these issues. Nicolás Lema Habash approaches the preeminent Peruvian Marxist José Carlos Mariátegui from the

innovative perspective of his treatment of the topic of enclosure, bringing to light questions of Eurocentrism and the always problematic nexus between European and Latin American Marxisms. Irina Feldman and Roberto Pareja's paper traces the disagreements between two key Bolivian intellectuals belonging to two distinct generations: Franz Tamayo and Fausto Reinaga. By focusing on the role that the Armed Forces played for both authors in the 1952 National Revolution, Feldman and Pareja argue that the Leninist-inspired readings of Reinaga offer a different perspective on the National Revolution and a different reading of the indigenous subject in the national narratives. Felipe Lagos Rojas argues that the important Bolivian sociologist René Zavaleta Mercado's notion of *abigarramiento*, or the motley, constitutes one of the most germinal contributions of political reflection from a Latin American perspective to contemporary global debates. Offering a critical analysis of the term within the context of the Marxist debates, it offers reflections upon how the concept of the motley can contribute to understanding of neoliberalism beyond the global South.

The third and final section, on cultural life, contains two papers. Gwendolen Pare uses the tools of close reading in order to explore the Chilean Pedro Lemebel's rejection of the official Communist Party's blindness vis-à-vis discursive and physical gender violence, while still adhering to the ideals of Marxist-rooted resistance to the right-wing ideology and violence during the Pinochet dictatorship. The theoretical focus of her paper is around the question of biopolitics, thematising issues such as the state of exception, immunization, and anomia. It focuses on the way in which the transition to democracy in Chile masked a move from the state as the centre of social activity to the market, offering parallels to similar discussions in Carol Muñoz's paper in the Cuban context. This transition is not historically organic, and Pare reveals this by using theoretical tools from outside of Marxism to critique the teleology prevalent among the Chilean left at that time. In turn, Laura Lema Silva's paper explores the treatment of aesthetics in José Carlos Mariátegui's work in order to elaborate a series of reflections on the possibility of aesthetics as an emancipatory practice in Marxist terms. Lema Silva puts forward the usefulness of a Marxist poetics based on Mariátegui's conceptions in order to examine the ways in which they could go beyond certain limitations of decolonial literary criticism. She proposes that a Marxist poetics based on Mariátegui's criticism rethinks the relation between artistic creation of universal scope and the defence of local particularities. Moreover, Mariátegui's works point towards a more complex definition of the interaction between local creation and cosmopolitanism.

In the remainder of this introduction, we discuss some of the key themes in the book which we regard as bringing the chapters together beyond the three different sections into which the book is divided. These reflections are intended to introduce readers who are less familiar with some of the current debates in Marxism to wider issues at stake in the chapters, but also provide an opportunity to highlight some important contributions that this book makes as a whole to our understanding of Latin American political economy and society, Latin American Marxist thought, and Marxist theory in general.

## **Global Capital and Latin American Spaces**

The book offers different perspectives on the contested relations between globalized capital and Latin American spaces, from a re-evaluation of dependency theory and open Marxism to socio-spatial approaches based on Henri Lefebvre's seminal work on the production of capitalist spatiality.

First, the destructive impact of contemporary, financialized capital across Latin America is central to the argument of Geddes (chapter three), who shows how huge megaprojects are imposed on local populations across Latin America. Today's forms of global capital continue to exacerbate the way in which the "open veins" of the continent are tapped through extractive and infrastructural projects via a logic of investment based not on social needs, and not even on the profitability of the projects themselves, but the potential for profit on the global financial and capital markets.

Secondly, Lorenzo Fusaro's revisiting of the debate opened up by the dependency theory and its epigones delivers insights on the regenerative power of Latin American theorizations in rethinking Marxist perspectives on capital and capitalism across the world, and particularly in the global South. Fusaro's reading of the debate between dependency theory and the so-called "political Marxism" (famously summarized by the Brenner/Frank debate) clarifies some key aspects of Marx's General Law of capitalist accumulation, rooted in a non-orthodox conception of the working class as always-already constituted by the "reserve army." With this theoretical gesture, and regardless of the bias towards an explanation circumscribed by the effects of unequal exchange, dependency theory locates the uneven distribution of wealth among nations as an internal feature of class exploitation, thus helping to understand the role of dependent nations in the outsourcing of metropolitan contradictions for capital accumulation. That is, the international division of labour would be not only the drawing of a differentiated national productive specialization (agricultural, industrial, or otherwise), but first and foremost a North/South division of the organic composition of capital in its labour dimension.

Thirdly, this book contributes to the Marxist theorization of the spatial dimensions of the historical development of global capital in Latin America. In the 1980s, the Uruguayan literary critic Ángel Rama made a major contribution to the study of the connections between urban space, intellectuals, and power. In *The Lettered City*, Rama pictured the Spanish imperial project as an enormous conveyor belt of mercantile capitalism across the immensity of the American space with its pulleys in the urban centres (Rama 1987, 25–6). Together with Rama, José Luis Romero and Richard Morse were influential in the constitution of the field of Latin American urban cultural studies (Gorelik 2002; Biron 2009). Rama’s point of departure in *The Lettered City* was Michel Foucault’s classical episteme as a window to understand the Spanish colonial model of urban development and the function of the lettered urban elite, but he also drew from Marxism and class-based analysis, as did, for example, Romero in his study of Latin American cities as loci for the production of knowledge (Romero 1976).

The development of a Marxist socio-spatial theory that began with Henri Lefebvre’s work and continued with critical appropriations of his conceptual elaborations after the early 1970s (Brenner and Elden 2009, 1) has led to a reconsideration of the role of space in the social sciences and the humanities. Rama’s and Romero’s seminal contributions are still relevant, but Lefebvre’s perspective brings a much-needed reconceptualization of the Marxist modes of production in relation to space, and in particular offers a way to understand how the state produces its own forms of spatialization. For Lefebvre, space is a social relation inherent in the relation of property and linked to the productive forces: “Space is permeated with social relations, it is not only supported by social relations, but it also is producing and produced by social relations” (Lefebvre 2009b, 186). Also, and crucially, the space proper to capitalist modernity does not result only from capitalist strategies – economic or political – but also emerges from the intervention the state performs in the social spaces, and which preceded capitalism (Lefebvre 2009a, 224–6).

In this vein, Nicolás Lema Habash argues that, in the work of Mariátegui, concepts such as “communism, feudalism and capitalism designate, not only productive modes, but also a specific relationship with the space.” In this sense, as the author suggests, Mariátegui’s ideas prefigure Lefebvre’s socio-spatial theory, showing Mariátegui’s analysis of Peru’s modes of production under a geopolitical lens (the world system) and through the local reality of enclosed spaces like the *hacienda*. Mariátegui, as a thinker of the production of spatiality, can also be considered a “geopolitical activist” who, by analysing the multiple modes of production and their associated spaces, can

offer a model for the production of a space that could transcend capitalist state space. Furthermore, Mariátegui's notion of revolution remains a global one, as in it every country and region will play a particular role. And one of the keys in such a conception of revolution lies in the reconstruction of the notion of community on a larger scale; thus, the contrasting historical facts of the Inca community and the semi-feudal hacienda are indicative of the geopolitical necessity of new forms of connectivity that in turn help redefine local particularities in an emancipatory way. If, as Antonio Melis famously stated, Mariátegui was the first Marxist of America (Melis 1967), from Lema Habash's paper we can add to this that he was also the first Latin American Marxist talking from a global standpoint.

## The State

The state is seldom absent from debates about Latin America, whether on the left or the right. For much of the last one hundred years, the archetypal Latin American state has been authoritarian, and frequently dictatorial. But especially from the time of the Cuban revolution, states promising much to the left have emerged. Accordingly, the book offers snapshots of this rich and complex history of the state, and of thinking critically about it, in Latin America during the twentieth and twenty-first centuries.

In the 1920s and 1930s, the period during which Mariátegui was writing in and about Peru, the dominant form of state in Latin America was authoritarian and oligarchic. Latin American states occupied dependent positions in the global state system. But as Lema Habash and Lema Silva (chapters five and nine, respectively) discuss, states like Peru were also inflected by their history of *indigenismo*. Both the history of indigenism – in the form of the Inca empire – and the survival of institutional forms such as the local *ayllu* differentiated such states from purely Western models. Lema Habash argues that Mariátegui's emphasis on a connected network of local communities and the specificity of each underlies his vision of global revolutionary change for Indo-America and the proletarians.

The influence of non/pre-capitalist forms was taken further by the Bolivian writer René Zavaleta Mercado, who wrote between the 1950s and 1980s. Lagos Rojas (chapter seven) discusses how Zavaleta's conception of the "motley" (*lo abigarrado*) reflects the Latin American context of uneven and non-combined development of capitalism and internal colonialism alongside the continuing presence of elements of non/pre-capitalist modes of production. As Lagos shows, Zavaleta then continued the Gramscian path to understanding hegemony as the political translation of the Marxist distinction between formal and real subsumption, and consequently coined

the term “apparent state” as a form of the capitalist state which projects the unity of what is not yet unified. In other words, Zavaleta’s innovative readings of the “apparent state” in Gramscian theory were used to understand state development in Latin America according to what others writing at the same time called the “uneven and combined” nature of its own capitalist development.

If Mariátegui and Zavaleta highlight the limits to which (at least some) Latin American states can be understood purely from the perspective of general theories of the capitalist state, the Cuban revolution of the 1950s (chapter two by Carol Muñoz) introduced to Latin America the one-party “socialist” state of the Cuban Communist Party. State socialism is defined here as an actually-existing socioeconomic formation dominated by state ownership of property, command mechanisms for surplus-value extraction, and a state-planned strategy for accumulation. Although other economic relations always coexisted in Cuba, and even increased after the collapse of the Soviet camp, the overarching configuration has been different from market capitalism, seen as the management of capital relations through private property and the market as the main mechanism for determining productive goals, prices, and wage. Muñoz focusses on one aspect of the post-revolutionary Cuban state – its role as an economic actor in the state-run economy, in particular tracing the eventual transition of one sector, mobile and internet services, through a state-owned company towards full commoditization. Muñoz emphasizes the dependence of Cuba within the global economy as the dominant factor behind this transition, and draws attention to the inequalities in access to these commodities which result from this.

Broader issues of dependency are the subject of chapter one. Here, Fusaro highlights “the development of underdevelopment” as the key overarching process dominating the formation of the Latin American state, while simultaneously emphasizing the specificities of individual Latin American states resulting from local class struggles. He adopts Gramsci’s concept of hegemonic and subordinate or dependent states, arguing that the latter are not only differently integrated into core states’ circuits of capital (thus, for example, the extractivist state), but “should also be understood as loci where the contradictions of capital can be outsourced to”. Following Gramsci and Poulantzas, he argues that the specificity of states within the world system is bound up with the periodization of capital, and has both temporal and spatial dimensions, but where Gramsci distinguished between East and West, he focuses on North and South.

Some of the above themes are also present in Matthes’s consideration of the contemporary Bolivian plurinational state (chapter four). She points to



the tensions in the Bolivian state between centralizing pressures and the state's response to indigenous demands for autonomy, and parts company with Zavaleta on the grounds that his assumption of the incomplete penetration of the capitalist mode of production is problematic, since the indigenous population is not outside the capital relation. Arguing then for a relational approach in which the state is inherently contradictory, she criticizes Garcia Linera's assertion that tensions in and around the state are "creative," implying that the state is capable of resolving them. Recognizing the contributions of Holloway and Picciotto and Clarke for the critique of the state as the political form of the social relations of capital, Matthes highlights the contribution of Open Marxism to understanding how "the state filters and displaces struggles, subordinating them to the process of value production" (Clarke 1991). In the Latin American context, she goes on to suggest, this perspective must be complemented by a radical critique of coloniality (see the following section).

Like Matthes, Geddes (chapter three) sees the state as a form assumed by the contradictory capital relation – a form into which the contradictions of capital may move. Focusing on contemporary struggles against infrastructure megaprojects, he identifies the challenge to movements opposing such projects to find ways to engage with the state, while refusing statist logic. Engaging with autonomist "anti-power" arguments (Holloway 2005; Zibechi 2010), Geddes suggests that in certain circumstances, such as contestation of megaprojects, opposition requires engagement with state power; it means doing politics with and within the state as well as beyond it. The broad social base of opposition to some megaprojects also poses questions about the advantages and disadvantages of moving beyond more narrowly class-based forms of opposition to contemporary capital.

Feldman and Pareja study the concepts of state, revolution, and culture in post-1952 Bolivia, analysing the debates around the *de facto* dissolution of the army after the revolution. They argue that a Marxist analysis of the sociopolitical and cultural aspects of revolutionary contexts must include a consideration of the culture-state nexus. They show how the key Bolivian *indigenista* writer Fausto Reinaga criticises the liberal idea that culture is supposed to function as an instrument of citizen education for the state. For Reinaga, as the authors show, the revolutionary moment of 1952 called for a radical break with the bourgeois state institutions if post-revolutionary Bolivia was to advance on its road to indigenous and worker liberation. According to Feldman and Pareja, for Fausto Reinaga, the Bolivian army was a paradigmatic institutional space because it stages a theatrical representation of Bolivia's caste hierarchy, and at the same time uncovers the false universality of the bourgeois state.

This book thus makes several contributions to Marxist perspectives on the state. It demonstrates the continuing relevance of historical experience; it emphasizes the necessity of both broad theoretical perspectives and the recognition of specificity; and, perhaps most importantly, several contributors to the book, along with theorists such as Mariátegui and Zavaleta, draw on Western theoretical perspectives but adapt them to the Latin American context, making in the process important new contributions to the theorization of the capitalist state globally, arguing that Latin American perspectives are relevant not only to Latin America but to other contexts, including the global North. For example, the Bolivian experience in constructing a plurinational state is surely relevant in the global North where the multicultural nature of many countries is at odds with state structures and practices still based on the notion of a single national culture.

## **Marxism and Postcolonialism**

As an area still affected by its colonial heritage, studies of Latin America form an important case study for further exploring the troubled relationship that has long existed between postcolonial studies or decolonization movements, on the one hand, and both the theory and practice of Marxism on the other. Indeed, Marxism has long been perceived by some as a Eurocentric discourse which has been unable to account for the complexity of postcolonial societies such as those found in Latin America. In contrast, others have perceived a need to move away from postcolonial analyses in areas such as Latin America, claiming that these have been far too anchored in arguments that privileged cultural or literary texts (what Marxism would traditionally think about in terms of the “superstructure”) and did not pay enough heed to the importance of political economy. The infamous polemic between Vivek Chibber and members of the South Asian Subaltern Group and others associated with the group is but one important moment of such a debate (Chibber 2013). The world-system analyses of Immanuel Wallerstein went some way to contributing to a non-Eurocentric view of capital, understanding the modern world system as the result of complex global networks that emerged from the late medieval era. Despite the heavily Marxist framework of Wallerstein’s insights, however, many of the analyses from the decolonial group (as they have called themselves) emerging from Latin American studies, largely based on Wallerstein’s observations, have rejected Marxist analyses as being an inappropriate lens for studying the region, where class differences are much less important than those based on race and ethnicity (Mignolo 2007). This anti-Marxist sentiment is partly the result of the failure of some of the more mainstream

left-leaning parties and movements throughout the second half of the century in Latin America to effectively represent ethnic groups, especially the indigenous peoples, and to move beyond more classical Stalinist notions of Marxism, in spite of the existence of a long history of critical Marxist writers who worked extensively on innovating Marxist theory in local conditions – from Mariátegui to Reinaga and Zavaleta Mercado.

The polarization of this question in public and academic debates has often been unhelpful, and draws attention away from a body of critical literature which has sought to both shape our understanding of postcolonial contexts from the perspective of Marxist theory, as well as simultaneously challenge Marxist theory precisely wherever it finds limits in its more classical formulations. One of the most important foundational figures of intellectual Marxism in that sense is the Peruvian José Carlos Mariátegui who, in his *Seven Interpretive Essays on Peruvian Reality* (1928), argued that the question of the land remained the most important barrier to a Marxist revolution in Peru due to the ongoing influence of the country's colonial legacy, thus applying an innovative interpretation of the Marxist analytic appropriate to local conditions. Both Lema Habash's "The Problem of Enclosure" (chapter five) and Lema Silva's "José Carlos Mariátegui's Artistic Criticism: for a Broader Approach to Aesthetics' Emancipatory Potential" (chapter nine) engage with the legacy of Mariátegui's thought. Both authors show Mariátegui's contribution as an original Latin American Marxist thinker. What is interesting about both of these chapters is that they do not fall into the trap, often present in the literature on Mariátegui, of attacking the Peruvian Marxist as either "Europeanizing" or a genuine "Latin American" (i.e. anti-European) thinker, but move beyond this dichotomy to reflect on Mariátegui's complex position as an intellectual who was able to reflect on his own local conditions while at the same time contributing to a general theory of emancipation whose pretensions were universal and from which we can still learn today.

Indeed, the merit of these and other chapters on key Latin American Marxist intellectual figures is the resistance to reducing them to merely "local" intellectuals, or intellectuals of the "local." Instead, the chapters offer ways of thinking through and beyond the insights of these key figures, to understand not only how they were capable of adapting Marxist theories to their own times and spaces, but in what ways their insights can help us to rethink important debates in contemporary Marxist theory. Felipe Lagos Rojas's chapter "Thinking with Zavaleta's *Lo Abigarrado*" (chapter seven) offers a detailed account of the theoretical background that informs Zavaleta Mercado's now well-known formulation of Bolivian society as a "motley society" (*sociedad abigarrada*). The value of Zavaleta Mercado's work

within Bolivia has long been recognized as an original theoretical contribution to understanding the complexities of Bolivia's neo-colonial condition from a Marxist lens (see, in particular, Tapia Mealla 2002), and his work is just beginning to earn greater prominence in international Marxist theory boosted by his importance in public discourse under Evo Morales's administration, as evidenced by the recent translation of Zavaleta Mercado's most important work *Lo nacional-popular en Bolivia* (1986) as *Towards a History of the National-Popular in Bolivia* (2018). Felipe Lagos goes beyond the commonly-held idea that the term "motley society" is used to describe local, Bolivian conditions, and promotes the idea of a Zavaleta capable of creating innovative theoretical notions from an analysis of local conditions which describes a temporality of capital with much wider implications. Zavaleta first coined the term to deal with Bolivia's – and more generally Latin America's – lack of unification under the capitalist mode of production, and thence aimed to adequately address conjunctures signalled by colonial and postcolonial histories. For Lagos however, the concept of the motley is a critical feature for contemporary materialist analysis at a global scale, affording a new understanding of the crisis of representation that currently characterizes modern state institutions. Moreover, Zavaleta's Marxism draws on a mix of Gramsci and Foucault to envisage some crucial transformations of the state/civil society relation provoked by neoliberal regimes. Lagos even proposes speaking about a "global *abigarramiento*" as part of the contemporary postcolonial condition associated with neoliberalism.

Irina Feldman and Roberto Pareja's chapter "Franz Tamayo and Fausto Reinaga on the State, the Army and Revolution in Bolivia of 1952: A Dialogue between Liberal and Marxist Traditions" (chapter six) focuses on the polemic between two important indigenist Bolivian intellectuals: Franz Tamayo and Fausto Reinaga. The discussion of this polemic offers a unique contribution to the legacy of these two Bolivian intellectuals from a Marxist theoretical perspective, while at the same time creating an interesting and original lens through which to assess the "missed opportunity" of the 1952 Bolivian revolution. The debate is particularly important because, on the one hand, Reinaga would criticize the liberal position of Tamayo from his own background in Leninist revolutionary Marxism, and, on the other, Reinaga himself would become one of the forerunners of the major indigenous political movements during and immediately after the military dictatorships in Bolivia in the 1960s and 70s. In this sense, an assessment of Reinaga's critique of the fellow indigenist Tamayo contributes to our understanding of the complex ways in which an indigenist like Reinaga drew on Marxism to shape his understanding of the postcolonial society in

which he lived, where, as he recognized it, the indigenous were key to a successful and radical revolution. The reassessment of Reinaga in Feldman and Pareja's chapter once again goes beyond a regionalist analysis of Reinaga's legacy, drawing conclusions from his writings about the nature of revolution which have important implications for Marxist theory more generally.

While these chapters help to reassess the complex relationship between Marxism and postcolonialism by studying key intellectual figures from the Latin American Marxist tradition, others make similar contributions on the basis of empirical studies. Although there are already a number of empirical case studies which have analysed Latin American states, social movements, and political economy from the perspective of the region's position in the capitalist world-system, a number of chapters in this book make significant contributions to our understanding of the workings of capital by focusing on less well-trodden ground. This is the case for Mike Geddes's chapter "Megaprojects in Latin America: Infrastructure, Capital, States, and Civil Society" (chapter three) and Carol Munoz's chapter "Commodification as Value Capture in Cuba's Telecom and Wireless Sectors" (chapter two), for example, giving an insight into a comparative study of megaprojects in the region, or into the limitations of the Cuban planned economy in the area of telecommunications, respectively. Although neither deal directly with questions of postcolonial studies, they contribute to the overall gesture throughout the book of drawing out broader lessons for Marxist theory and practice in terms of understanding the contemporary complexity of neoliberal capitalism, and, in the case of Geddes's chapter, the successes and limitations of social movements in bringing the new entrenches of brutal capitalist development to a halt. In this sense, these chapters highlight not only the lessons that can be learnt about Latin America through the application of a Marxist analysis, but also those that can be drawn from case studies often considered at the "periphery" of contemporary capitalist accumulation and (re)production.

Britta Matthes's chapter "Rethinking the Category of the State: the (Pluri-)National State and Struggles for Autonomy in Bolivia" (chapter four) directly confronts the difficult question of the challenges and contradictions of the reformist left-wing government in Bolivia and the project of decolonization led by both the state and civil society. Arguing that the once-promising project of a plurinational state in Bolivia has actually led to the subordination of local claims for autonomy for a reformed state-led capitalist accumulation, Matthes argues for the need to rethink current Marxist theories of the state in ways that may be compatible with a project of decolonization. Matthes suggests a way forward by claiming that

a critique of the state as a “political form of the social relations of capital” can contribute to a more nuanced understanding of the way in which the state can incorporate civil-society demands in order to remove obstacles for the accumulation of capital. This thought-provoking chapter opens up the question, in light of its conclusions, of how to envisage a state from within Marxist theory that could be genuinely open to the diversity of postcolonial societies, offering a political form for relations that are other than capitalist.

Finally, Lorenzo Fusaro’s chapter “The Development of Underdevelopment Before and Beyond Dependency Theory and Political Marxism” (chapter one) draws on Marx’s writings on primitive accumulation in order to rethink the question of “underdevelopment,” challenging dominant approaches to this question in dependency theory and political Marxism, such as in the work of Robert Brenner. Through a close reading of Marx, Fusaro goes further than many other theories of dependency in stating the importance of, not a lack but the very presence of capitalist relations in explaining so-called underdevelopment, and in so doing brings into question the entire edifice of development as a model for measuring or understanding the capitalist economy and its effects. Indeed, Fusaro shows that, for Marx, the development of capitalism necessarily entailed a concomitant development of underdevelopment, presenting a systemic contradiction in which, the author claims, capitalism as an organization of the forces of production is itself unable to overcome. These insights have important consequences for any reflection on the postcolonial nature of the region as part of a capitalist world system. Although Fusaro does not make reference to this issue in his chapter directly, his claim that capitalism produces more and more underdevelopment by necessity is compatible with the recent analyses of capitalism as a world ecology or web of life (Moore 2015), offering important environmental implications which are at the heart of current debates which concern both Marxism as political ecology as well as postcolonial studies.

The chapters in this book adduce empirical evidence that theories produced on the periphery of capitalist production – in this case in Latin America – must be read as equally useful, when universalized, as the European theories produced from the privileged position of the global North.

## **Latin American Marxism and Gender**

The question of oppression and exploitation based on gender has been historically one of Marxism’s “blind spots.” In this respect, our volume showcases both the movement towards Marxism’s increased attention to the

questions of gender, and the limits of this incorporation. One chapter, authored by Gwendolen Pare, addresses this necessary dialogue directly in her analysis of Pedro Lemebel's leftist politics; while the Feldman and Pareja chapter acknowledges the problematic relations between Marxist-Indianista discourse and the question of gender.

In Latin American Marxist and, broadly speaking, leftist discourses of the twentieth century, spilling into the twenty-first, the characteristically masculinist rhetoric has dominated in different contexts. In this volume, one example is the evocation of the Indian man (as opposed to Indian woman) in Fausto Reinaga's Marxist-Indianist program (see Canessa 2010; 2012), a topic touched upon in the chapter by Feldman and Pareja. The other instance is a discourse of the romanticization of the revolutionary male hero of the Cuban Revolution, his image modelled on that of the visionary Che Guevara (see Geidel 2010), criticized by Pedro Lemebel in the analysis by Gwendolen Pare.

The alienation of Latin American Marxisms from the struggles of women and LGBTQ persons is not, however, historically predestined or necessarily enduring. Latin American intellectuals and activists, especially in the last two decades, have successfully deployed the tools offered by Marxism and gender theory in order to advance the politics of liberation and critique capitalist exploitation and its particular logic in the postcolonial contexts. Bolivian activist groups *Mujeres Creando* and *Mujeres Creando Comunidad* are successful examples, both theoretical and actively political, of the powerful coupling of the two theoretical currents (Daly 2011).

## Conclusion

As we stated at the beginning of this introduction, this book makes no claim to be a comprehensive survey of Latin American Marxisms. Instead, we hope that it not only offers chapters of interest to specialists in different topics, but advances several broader contributions and contentions in relation to the questions we raised at the outset of this introduction: what is Latin American Marxism, and what theoretical, explanatory, or practical force does this coupling hold, historically and contemporarily? What are the contributions to Marxist theory made by Latin American thinkers? And what Latin American experiences inspire the reflections that drive today's Marxists to renew their approaches, sometimes challenging the allegedly Marxist canon?

In pursuing these questions, we have found it important to open up both dialogues and conflicts within Marxism, but also dialogues between Marxist approaches and other theoretical frameworks such as postcolonial studies,

decolonial studies, and biopolitics, to mention just a few. We hope that this will encourage an engagement with the book by a readership which transcends Marxist practice and theory. We make no apology for the fact that the book presents an eclectic mix, which is rich precisely because of its heterogeneity. One important aspect of this heterogeneity is that different chapters deal with both contemporary and historical events and thinkers, in the process making the case that the past theorizations illuminate present efforts. Moreover, many of the chapters are risky in the sense that they go beyond compartmentalized knowledge areas. In particular, within this rich mix, cultural analyses stand out – the book is an argument for the crucial contribution of cultural analysis to Marxism. This volume may surprise some readers in that it does not understand Marxism as being little more than political economy.

Finally, we expect that this volume will make a contribution beyond Latin America. While many on the political left across the globe were enthused by the rise of the so-called “pink tide” a decade or more ago, but have been disappointed by its limitations and compromises, we hope that this book will help to show that there is a wider and longer-lasting left tradition in Latin America. If it succeeds in bringing a taste of these Latin American Marxisms to a wider audience, it will have done its job.



# **PART I**

## **POLITICAL ECONOMY: RETHINKING THE LOGIC OF CAPITAL**



## CHAPTER ONE

# THE DEVELOPMENT OF UNDERDEVELOPMENT BEFORE AND BEYOND DEPENDENCY THEORY AND POLITICAL MARXISM: REREADING MARX'S GENERAL LAW OF CAPITALIST ACCUMULATION

LORENZO FUSARO<sup>1</sup>

### **Introduction: Marx's Error?**

Robert Brenner's seminal article "The Origins of Capitalist Development: a Critique of Neo-Smithian Marxism" published 1977 in the *New Left Review* counts as one of the most established (and accepted) critiques of dependency theory, and its author, in the words of Howard and King (1992, 210), is the "strongest critic of Baran, Frank and Wallerstein." Brenner's article aims chiefly at criticizing dependency theory's and world systems theory's analysis of the transition to capitalism. Yet, in doing so, he also seems to dismantle dependency theory's central claim adopted by Frank and Wallerstein that capitalism produces both development and underdevelopment, and that the two are causally interrelated. Indeed, dependency theory, and in particular its radical strand, among which we count the works of Theotonio Dos Santos, Ruy Mauro Marini, Gunder Frank, and Osvaldo Sunkel, underlines the dual or contradictory nature of capitalist development and argues that capitalist modernity should be conceptualized as including both development and underdevelopment (Katz 2016; Kay 1991). In this sense, and as Dos Santos (1978, 304–5) has stressed, "underdevelopment" ceases to be seen as a phenomenon that stands "outside" or "before" capitalism. It is capitalism itself, as Gunder Frank's (1967, 9) famous expression goes, that results in "the development of underdevelopment."

In order to outline his critique, Robert Brenner actually starts from Marx and Engels' supposed error in the *Communist Manifesto* in

envisaging worldwide capitalist expansion, accompanied by “a process of capital accumulation and economic development more or less following the pattern of the original homelands of capitalism” (Brenner 1977, 25). Brenner’s critique suggests that, contra Marx, “capitalist expansion through trade and investment *failed* to break the old modes of production ... or actually to strengthen the old modes” (1977, 26, author’s emphasis). The continuing existence of pre-capitalist modes of production is crucial for Brenner’s argument, as “underdevelopment” resulted, and still results, from a *lack* of capitalist relations of production. His well-known thesis suggests that development is a consequence of specific class structures, capitalist class structures, here understood as entailing the separation of producers from the means of production and the formation of the commodity “labour power”. For it is only under capitalist relations of production, Brenner argues, that an economy has the incentive, even *the necessity*, to develop the forces of production (Brenner 1977, 32). Here the establishment of capitalist relations of production is understood as deriving from the “class struggle” whereby the latter can have contrasting outcomes. Thus, in England, according to Brenner, class conflict did indeed lead to the establishment of capitalist relations of production resulting in “development”. By contrast, in other places such as Eastern Europe or Latin America, this was not the case (Brenner 1976; 1977, 78), leading to “underdevelopment” in these regions. It is therefore not capitalism but the absence of capitalist relations of production that results in underdevelopment.

Following Brenner’s view, Marx – at least when writing the *Manifesto* – was hence wrong in maintaining that capitalist expansion would lead to the adoption of capitalist relations of production across the globe and that this would lead to development. But does this truly amount, as Brenner would have it, to Marx thinking that, on a global level, the establishment of capitalist relations of production would lead to “a process of capital accumulation and economic development”? And does the establishment of capitalist relations of production represent a *sufficient* condition for development? What if the establishment of capitalist relations of production does not guarantee economic development and can therefore also lead to “underdevelopment,” as Latin American Marxists also thought?

Even a superficial reading of the *Communist Manifesto* suggests that Brenner’s claims might be problematic and that Marx and Engels’ analysis might be seen as anticipating the later elaboration provided by Latin American Marxists centred on the development of underdevelopment. Marx and Engels pointed to elements that, as we shall see below, would

later be entailed within Marx's General Law of Capitalist Accumulation, stating that the development of capital, while proportionally developing the proletariat, does not necessarily guarantee that the latter is fully absorbed into the production process, thus opening the possibility that a very large part of it might fall into poverty – a condition that is usually associated with “underdevelopment,” as we shall see. As Marx and Engels put it:

In proportion as the bourgeoisie, i.e., capital, is developed, in the same proportion is the proletariat, the modern working class, developed – a class of labourers, who live only so long as they find work, and *who find work only so long as their labour increases capital*. These labourers, who must sell themselves piecemeal, are a commodity, like every other article of commerce, and are consequently exposed to all the vicissitudes of competition, to all the fluctuations of the market. (*Marx-Engels-Werke*, Bd.4, 468, author's emphasis)<sup>2</sup>

As a result, Marx and Engels assert later in the same text that “the unceasing improvement of machinery” that characterizes capitalist development, “makes their [the proletariat's] livelihood more and more precarious,” eventually condemning them to pauperism, noting that “pauperism develops more rapidly than population and wealth” (*Marx-Engels-Werke*, Bd. 4, 473).

To be sure, Marx and Engels' assertions in the *Manifesto* are not as elaborate as those put forward by Marx in *Capital*, yet the observations within the former text seem to suggest that Brenner's claims are at least questionable, while pointing to the validity of some of the assertions made by dependency theory, i.e. that capitalist development itself (and not the lack thereof) produces poverty and “underdevelopment.” In the following section, I will critically engage with explanations of the occurrence of underdevelopment provided by dependency theory and political Marxism. In section three I shall return to Marx's General Law of Capitalist Accumulation, arguing that Marx provided an analysis of the “development of underdevelopment” that might overcome the weaknesses of the aforementioned theories. Hence, I will maintain that following Marx's law, capital accumulation proportionally develops the proletariat, while also pointing out that a large part thereof (the so-called “reserve army of labour”) is ultimately not directly involved in the production process. Following Marx, this has the tendency to result in low levels of income, poverty and income inequality – in short, “underdevelopment”. By way of illustration, and considering Latin America's reserve army of labour, I will show that it still accounts for sixty to seventy percent of the

(potentially) working population. In section four I will point to further research concerning the implications these insights might have when considering dependency, the specificities of Latin American states, and the class struggles that occur within the region.

## **The Limitations of Dependency Theory and Political Marxism**

While dependency theory presents several variants that restrain the possibility of generalizing its main theses, it is, I believe, probably fair to suggest that the systemic condition of underdevelopment is largely explained by the *transfer of surplus* from the periphery to the centre (Gandarilla 2005), and the implications this had by heavily influencing the economic structure of subordinated economies. Initially, following the majority of the mentioned works, the transfer of surplus is related to processes of “primitive accumulation”, here (in my view, wrongly) understood as an accumulation of wealth to be used to kick off capitalist accumulation. According to this reading, economic development in sixteenth and seventeenth-century Europe was largely based on the “pillaging” of colonial territories. In order to substantiate this argument, one might recall, for example, that relying on J. H. Elliot’s account, Perry Anderson (1974, 90) contended that under Philip II’s rein (1556 to 1598) colonial bullion represented twenty to twenty-five percent of Spain’s revenues. Ernest Mandel, based on data provided by various authors, concluded that the overall transfer of resources from the colonies represented one billion pounds, which, according to his calculations, equalled “more than the total value of capital invested by the whole of European industry up to 1800” (Mandel 1971, author’s translation). Relying on Enrique Semo, Agustín Cueva (1977, 13) speaks of “primitive *des-accumulation*” in Latin America, maintaining that the region was deprived of the means to enable primitive accumulation to take place in the continent itself. Yet, the transfer of surplus that resulted in the development of the centre and the underdevelopment of the periphery is argued to be a persistent feature of the capitalist world economy. The central theoretical framework adopted to capture the transfer of surplus is that of *unequal exchange*, the explanation for which has varied over the years and has been further substantiated by Marxist economists. While Emmanuel’s (1972) analysis focused on low wages and higher rates of exploitation in the periphery as enabling a transfer of surplus towards the centre, the theory has since more largely focused on technological and productivity differences between centre and periphery (Shaikh 1991;