

Goldsmiths, University of London

**The Misadventures of Latin American Marxism.  
Intellectual Journeys Towards the  
Deprovincialization of Marxist Thought**

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Submitted for the degree of Doctor in Sociology

November 2016

This thesis was funded by the Comisión Nacional de Investigación Científica y Tecnológica, Ministerio de Educación, Chile.

Declaration

I, Felipe Lagos Rojas, declare that this thesis is all my own work.

A handwritten signature in black ink, appearing to read 'Felipe Lagos Rojas', with a horizontal line striking through the middle of the letters.

Date: 01/11/2016

## Abstract

This work revisits some trajectories of Marxism in Latin America characterized by their non-official or critical stance vis-à-vis official versions of Marxism, in order to trace and reconstruct a number of attempts to produce a distinctive 'Latin American Marxism'. The theoretical framework of the thesis draws upon the conceptual achievements of the authors and currents revisited, based (sometimes wittingly and explicitly, sometimes not) on the categories of uneven and combined development, plural temporalities, and translation. Chapter I organizes the conceptual framework that accompanies the reconstruction, in which the common ground of the selected authors lies in to put into question the developmentalist and modernization apparatus that characterized official Marxism during the 20<sup>th</sup> century.

Chapter II and III reconstruct the work of Peruvian José Carlos Mariátegui, considered as the foremost translation of Marxism into a communal-popular perspective with roots in the Andean indigenous community or *ayllu*. Chapter II focuses on the centrality of 'uneven and combined development' in his confrontation to both the homogenizing perspective of the Second International and the theoretical 'exceptionalism' claimed by Haya de la Torre for Latin America. Chapter III continues the reconstruction of Mariátegui's Marxism in a different yet related register, namely through the incorporation of the notion of 'myth'. The notion appears as a keystone to comprehend Mariátegui's incorporation of the Andean ethno-cultural memories in the conceptual registers of historical materialism.

Chapter IV to VI address some reflections on the concomitances and tensions between Marxism and the 'national-popular' in Latin America. Chapter IV revisits the so-called dependency theory, a heterogeneous 'school' which questioned the assumptions of modernization theories and *desarrollista* frameworks. The chapter evaluates the extent to which the dependency school was able to disengage itself from the notion of development, from a geopolitically-located conceptualization of the capitalist world structure. Chapter V revisits the work of Argentinean Marxist José Aricó, in particular his reading of the 'misencounter' (*desencuentro*) between Marx and Latin America in the midst of the 'crisis of Marxism' during the 1970s and

'80s. The chapter argues that the notion of 'misencounter' can be read from the logic of uneven and combined development and its effects in the development of Marxist theory in the sub-continent. Chapter VI, finally, reconstructs the Marxism of Bolivian René Zavaleta Mercado, focusing on the characterization of Bolivia as 'motley' society (*sociedad abigarrada*), and the different temporalities that feature so defined social structures. In his attempt to produce local knowledge, Zavaleta envisaged a theoretical encounter between the working class and the indigenous movements in the midst of the question of democracy.

## Acknowledgments

To the memory of Guido Lagos Garay

Over the course of the last five years, I have received the support of many people, in written as well as in person. They have accompanied, inspired, challenged, and encouraged the arguments made herein. Their conversations as well as the challenges they have put on my arguments have considerably helped me develop my own thoughts. More importantly, they have provided me a veritable terrain wherein a strong engagement with the subalterns is possible by translational means. To these friends, colleagues, and comrades: this work is for you.

Firstly, I would like to thank my supervisor, Alberto Toscano, for his friendship, wise inspiration, and generous guidance during the writing of this thesis. Without his constant support, this thesis would not be possible, not only because of the partnership of our conversations, which combined firm criticism and definite comradeship, but especially for his advocacy and enthusiasm when my own scepticism about the task came to the fore. I am also indebted to other Goldsmiths staff members for their readiness to build an amazing scholar environment, especially to Vikki Bell, Mónica Greco, Marsha Rosengarten, Sanjay Seth, and Bridget Ward.

I am also grateful to those people who helped and oriented me at different levels in my research. First and foremost, throughout this time John Kraniauskas supported me with his friendship, reading and commenting some drafts as well as suggesting alternative viewpoints and literature to my own argument. Furthermore, we have embarked together in exiting projects for developing the contents and consequences of Latin American Marxism. Along with him, I have found the generous backing of friends all over the world, to whom I want to extend my heartfelt thanks: Omar Acha, Luis Andueza, Gavin Arnall, José Tomás Atria, Peter Baker, Daniel Chernilo, Irina Feldman, Pierina Ferretti, Anne Freeland, Juan Grigera, Sara Beatriz Guardia, Jim Kaufman, Paula Mena, Massimo Modonesi, Patricio Olivera, Felipe Palma, César Pérez, Raúl Prada, Ismael Puga, José Borges

Reis, Grínor Rojo, Luis Tapia, Horacio Tarcus, José Luis Saavedra, Alicia Salomone, Martín Savransky, Nicolás del Valle, Sergio Villalobos-Ruminott, and Gareth Williams.

The Tokyo Foundation, by means of the Sylff Program, honoured me with the SRA award to do fieldwork in Mexico, Buenos Aires, Lima, and La Paz. I wish to thank the Foundation for this support. In these places, I received large and crucial support from Carlos Azócar, Nair Castillo, Úrsula Indacochea, Mauricio Miranda, Cecilia Jaramillo, Evelyn Palma, Cristian Pozo, and Ariadna Soto. This research also benefited by the support of the 2015 Ibero-American Institute Grant, which allowed me to spend a writing-up period in Berlin. In this city, I once again found a kind of complicit partnership for which I am thankful to Pablo Faúndez, Ana María Ledezma and family, Claudia Maldonado, Emilio Martínez, and Álvaro Recabarren.

These 5 years in London were also a time for building new commitments in both theory and practice. To the participants of the *Capital* reading group: Pancha, Lucho, Claudio, Nico, Paz, Alicia, Miguel, Mijail; to the members of the Goldsmiths Latin American Hub: Lieta, Valentina, Rosario, Felipe; to all my enthusiastic comrades in the London-Chile Solidarity Group; and to the participants of the stream 'Latin American Marxisms' in the Historical Materialism Conference - thank you so much!

The love, support, and patience of my family and friends from Chile have been invaluable to generate the material and emotional conditions for this kind of work. I am lifelong thankful to my parents, Osvaldo and Kenna, my siblings Cristian, María Paz, Carlos and Valentina, my nephews Maximiliano and Vicente, and my grandmother Telma. My special thanks to Carla, Gustavo, Bernardita, Natalia, Benja, Javiera S., Nico C., Javiera M., Tomas, Marta, Lore, Marcelo, Jorge, Jocelyn, Inês, Camilo A., Lavinia, Camilo S., Kat, Ignacio, Catalina, Nico L., Papo, Mariana, Juan José, Miranda, Raúl, and Rayen.

Last but by no means least, the final part of this work coincided with the appearance of Francisca in my life, an encounter that transformed everything for good; she marked the more meaningful difference between walking, thinking, and

fighting for, and walking, thinking, and fighting for *with*. This thesis is dedicated to her.

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## Introduction. Marxism in/from Latin America: Difficulties and Engagements

'Un pueblo que oprime a otro no puede ser libre' ('A people who oppresses another cannot be free').

Inca Yupanqui, 'Diario de las Discusiones y Actas de las Cortes de Cádiz', 1810

This work is a contribution to the reconstruction of Marxism as theoretical movement in Latin America, at the same time that it attempts a reflection on the conditions of possibility of Marxist theorizing in the sub-continent. It seeks to examine some intellectual trajectories characterized by a critical stance vis-à-vis official versions of the Marxist theoretical tradition. My aim is to trace those conceptual formulations through which a distinctive 'Latin American Marxism' has been projected – or at least insinuated – as a recognizable constellation of ideas.

The first caveat necessary here involves the problem of taking for granted what is actually a troublesome formulation: the putative unity of the entity 'Latin America'. The difficulties begin from the very act of naming the region. Following the so-called 'discovery' of America in 1492, the presence of this 'new' region of the globe not only disturbed, challenged, and finally transformed the basic certainties of the 'old' world; it also inaugurated the exercise of naming the newcomer from overseas. Henceforth, terms such as *América*, *Nuevo Mundo* or *Indias Occidentales* were imposed on the region. Later on, once colonial rule was vanquished during the first decades of the nineteenth century, the refusal to maintain the identification with former colonizers provoked a sort of semantic availability, an opening up of the field of possibilities to rethink the region. However, the defeat of Simón Bolívar's project for a united federation of republics<sup>1</sup> was succeeded by the

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<sup>1</sup> For the clearest exposition of this project, see Bolívar's 'Letter from Jamaica' in S. Bolívar ([1815] 2003).

conflictive and uneven processes of building national states,<sup>2</sup> in which the problem of the region's name drifted in new directions.

It was by mid-nineteenth century when the prefix 'Latin' was adopted by Creole elites so as to differentiate the region from Anglo-Saxon American (i.e., US) presence. This reaction was no doubt related to the latter's expansionist endeavors, as they were heralded by the infamous Monroe doctrine in 1823. James Monroe's slogan 'America for the Americans' heretofore designated the South of the Rio Grande as the US' 'sphere of influence'; consequently, his calls for a 'Pan-Americanism' soon demonstrated to be the smiling face of an imperialist vocation. In 1846, the US Army invaded Mexico and deprived it of California and Texas; between 1854 and 1855, US's marines invaded Nicaragua, El Salvador and Honduras; and in 1898, a war against Spain was initiated in the Caribbean Sea, being its main targets Puerto Rico and Cuba.<sup>3</sup> These events were accompanied by the conflict between England and France as competing world powers, a dispute in which the French appellation to *Latinidad* (no doubt part of its imperial repertoire) commenced to seduce the elites of the region.

Nonetheless, the choice of *Latinidad* conspicuously obliterates the complex mixture of cultural traditions existing in the region, Afro- and Indo-American components in the first place.<sup>4</sup> At the end of the nineteenth century, Uruguayan José Enrique Rodó (let's recall, an elitist, aristocratic writer) offered in *Ariel* what was perhaps the most influential argument for the distinction of Anglo-Saxon 'materialism' and Latin 'spiritualism'. Conversely, Cuban writer and independence fighter José Martí chose to speak of *Nuestra América* ('Our America') and explicitly included the Amerindian and Afro-American elements in it.<sup>5</sup>

All in all, Latin America exudes a common colonial and post-colonial history: the shared histories of colonial subjugation and unified struggles for independence, as well as the violent interventions of US armies, diplomats, and policies across the

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<sup>2</sup> The period after the independence wars is commonly known as 'period of anarchy' (characterized by military *caudillismo* and civil wars) in Latin America's historical literature. See for instance A. Cueva (1990, ch. 2) and M. Kaplan (1976).

<sup>3</sup> For a comprehensive account of US imperialism in Latin America since 1898, see J. Petras & H. Veltmeyer (2015).

<sup>4</sup> It is worth noting that the currency of the name did not lessen with the (second) French invasion of Mexico between 1862 and 1867. See Miguel Rojas-Mix (1991: 343-50).

<sup>5</sup> See J. E. Rodó ([1900] 1967) and J. Martí ([1891] 1977).

region, portray a commonality that transcends national frontiers. However, since it is not a homogeneous history (be it in terms of geographies, languages, economic bases, popular traditions, etc.), its heterogeneous nature prevents any facile generalization, or the superimposition of another 'fictive ethnicity' (Balibar 1991) over the already established set of national identities.

The history of America's names is thus perhaps simply the summary of an ambivalent but evident dependence (economic as well as cultural) on the Euro-American 'West'. In this regard, and despite the colonial hallmark the term entails, Walter Mignolo (2005: 70) points out that *Latinidad* remains indicative of the rearticulation of the imperial/colonial world-system. What is currently known as 'coloniality of power' can be traced to the article 'Americanness as a Concept', co-authored by Aníbal Quijano and Immanuel Wallerstein in 1992. For these authors, America became a model of world-system organization since its very 'discovery', a model based on four factors: "coloniality, ethnicity, racism, and the concept of newness itself" (1992: 550). Coloniality refers to the subalternization of peoples and cultures out of the hierarchization of ethnic differences by means of the category of 'race' –itself a modern construct. Race appears thus as the pillar of such a hierarchy, insofar as some physiognomic features –predominantly skin colour– are regarded as signals of 'natural' differences among peoples. This is the central argument behind the concept of 'coloniality of power', although it was coined some years later. In this sense, Mignolo's consideration of the rearticulation of the colonial matrix as registered in the term *Latin* brings with it the demand to take into account the history of the processes of modernization, colonization and coloniality that have accompanied Latin America's nominations and identifications.

Mignolo's argument comes close to Luis Tapia's (2013, Part II) definition of Latin America as a *decolonizing epistemological horizon*. According to Tapia, this horizon has been historically composed out of three layers: first, the formal decolonization from Spanish and Portuguese empires; second, the affirmation (however precarious) of national states after formal colonial rule. The third moment, in turn, remains unaccomplished insofar as Latin America's decolonizing horizon includes – in Tapia's view – a movement of *internal decolonization*, that is, of social democratization in all dimensions, an issue in which the historical nation-state has

fallen short, to say the very least. The prefix 'Latin' would thus maintain the irresolution or liminar nature of *decolonization* as a constitutive tension of the projected object 'Latin America'.

I follow Naoki Sakai's (2006: 169, 188) reflections on Asia as neither a ready-made geo-cultural 'us' nor a merely cartographic locality void of content, but rather as a fluid and permanent movement of distinction and affirmation within the modern-colonial geopolitical landscape. From this perspective, I argue that Latin America must be considered as a historical-cultural project, not a matter of fact or a purely representational entity. If 'Latin America' holds the not-yet of internal decolonization as its historical backdrop, then we are dealing with a project or projection whose actuality comes from being carried out by real enough social and cultural forces, resisted by other equally real ones. From a shared colonial past, which turns out to be the moment of self-affirmation within the present, and signalled by the not-yet of internal decolonization projecting a possible future, 'Latin America' evokes from the outset a time-lag, a temporal split or break in representation that gives form to the 'post' of postcolonial experience (cf. Bhabha, 1995: 136).

\* \* \*

In the aftermaths of the 1960s, a series of self-examinations accompanied the Latin American left-intelligentsia. Among them, it aroused the idea of 'Latin American Marxism' as a possible subject of inquiry. During the late 1970s, José Aricó and Michael Löwy offered the initial contours of what is now a novel but fairly-established research field in the region. Löwy ([1980] 1992) compiled and published in 1982 the first anthology of Marxist texts written in the sub-continent, which contains writings from Juan Bautista Justo and Luis Emilio Recabarren (of 1909 and 1910 respectively) to late-1970s documents of the Nicaraguan and Guatemalan guerrillas.<sup>6</sup> In his influential 'Introduction' to the volume, Löwy did not explicitly

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<sup>6</sup> Löwy's anthology was first published in France by Maspero in 1980 as *Le marxisme en Amérique latine, anthologie*. It was translated into Spanish by Mexican editorial Era for the first time in 1982, and later into English by Atlantic Highlands in 1992. A new, extended Spanish

differentiate between 'Marxism in Latin America' and 'Latin American Marxism'; however, his presentation is traversed by the distinction between a mechanical, external application of an allegedly definite Marxist canon, and a concrete-dialectical adoption and recreation of Marxism within vernacular political engagements –the latter constituting a proper 'Latin American Marxism', if one follows Löwy's selective usage of the term. Löwy's implicit demarcation of Marxism *in* and *from* Latin America arguably derives from the general climate of the epoch in which it was formulated, that is, the long-lasting quarrels between 'orthodoxy' (Stalinism) and its varied 'heterodox' challengers.

A similar perspective guided José Aricó's pioneering work on José Carlos Mariátegui and the "origins of Latin American Marxism" (1978). Both Aricó and Löwy consider Peruvian author José Carlos Mariátegui as the major theoretical event for Marxism in the sub-continent. Particularly, Aricó introduces Mariátegui in relation to Marx and especially Lenin, explaining that the three were intellectuals situated in contexts of evident slippage in the foreseen paths of capitalist modernization. This fact was crucial – Aricó goes on – in their theoretical and political re-orientation towards subaltern classes as historical subjects. To put it differently, Marx, Lenin and Mariátegui were intellectual outcomes of the 'failure' of classical bourgeois development, evidencing thus the uneven and combined nature of capitalism. Nonetheless, shortly after having somehow inaugurated the field of studies and inquiries of that name, Aricó concluded (in the voice 'Latin American Marxism' of Norberto Bobbio's *Dictionary of Politics*) that to envisage a Latin-American reconstruction of Marxism, as proposed for instance by Mariátegui, is pointless in the aftermaths the 1960s, concluding that "[it] is worthless to set out the question of the existence or not of a Latin American Marxism." (1982: 956) The present moment of Marxism would be one of "disaggregation" (i.e., of predominance of national and local varieties of Marxisms), something which makes it unthinkable from the viewpoint of regional or global reconstructions.

More recently, in an insightful cartography of Marxism in the sub-continent Omar Acha and Debora D'Antonio (2013) offer a stimulating reflection that revives

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edition that includes articles of the 1980s, '90s and 2000s was published in 2007 by editorial LOM in Santiago de Chile. Translations into Portuguese were edited by Sao Paulo's publishing house Perseu Abramo in 1999 and 2012.

the debate on the actuality, nature, and contours of ‘Latin American Marxism’. They identify in the afterimage of the self-differentiation from an ‘original model’ of Marxism (be it explicit or surreptitious) an important element that makes Latin American Marxism possible, or at least conceivable. Nonetheless, they rightly warn against searching for a unique, exclusive feature that would signal its singularity. In other words, Latin American Marxism finds a constitutive moment in the suspension or putting-into-tension of any pretended universal validity of the Marxist apparatus, but it cannot be approached from a single element or set of elements, without running the risk of overshadowing the complexity of both the regional diversity and the variants of Marxism it has produced. In a similar vein, Ronald Munck (2007: 154ff) highlights the “liminal situation” and “hybridity” of the very category ‘Latin American Marxism’, when the plurality of its historical forms and narrow relationships with ‘national-popular’ patterns of class consciousness are taken into account. Finally, Bruno Bosteels has recovered the category of *desencuentro* (misencounter or mismatch), used before by José Aricó (1980) and more recently by Álvaro García Linera (2009a), so as to describe the conflictive historical relationship between Marxism and Latin America.

An indication of this newer field of inquiries, that contains but is not reduced to ‘Marxism’, is the current proliferation of journals such as Argentinean *Lucha Armada en la Argentina* and *Herramientas: Debate y Crítica Marxista*, as well as the research centre CEDINCI and its journal *Políticas de la Memoria*; the journals *Materialismo Histórico* and *iZQUIERDAS* in Chile; the research-centre Centro de Estudios Marxistas and its journal *Crítica Marxista* in Brazil; and the work of edition and publication of Bolivia’s Vice-Presidency [<http://www.vicepresidencia.gob.bo/?page=publicaciones>], to name only the best known. Among recent collective works, it is important to mention *Militantes, Intelectuales y Revolucionarios. Ensayos sobre Marxismo e Izquierda en América Latina* (C. Aguirre ed. and intro., 2013); *El Comunismo. Otras Miradas desde América Latina* (E. Concheiro et.al., 2007); *La Nueva Izquierda en América Latina* (D. Chavez et.al., 2008); and *Alternativas en América Latina: los dilemas de la Izquierda en el siglo XXI* (M. Toer et.al., 2006). Individual works have also proliferated; see for instance Bruno Bosteels’ *Marx and Freud in Latin America* (2012) and *El marxismo en América Latina: nuevos caminos al comunismo* (2013); Pablo Guadarrama’s *Marxismo y Anti-Marxismo*

*en América Latina* (1990); Jaime Massardo's *Investigaciones sobre la historia del marxismo en América Latina* (2001); Isabel Rauber's *América Latina: Poder y socialismo en el siglo XXI* (2006); and Roberto Regalado's *América Latina entre siglos: dominación, crisis, lucha social y alternativas políticas de la izquierda* (2006); and Alberto Saladino García's *Indigenismo y marxismo en América Latina* (1983), among many others that will be referred to in this work.

\* \* \*

Drawing upon the significant amount of works aimed at reconstructing the regional pathways of Marxism, this research is guided by a concern with the tensions and displacements that the 'object' Latin America has provoked in Marxist elaborations of the sub-continent. I argue that, from these tensions, a distinctive 'Latin American Marxism' becomes visible as a participant, in one way or another, of the political imaginaries and conceptual disquisitions that emerged in the region. The notions of encounter and misencounter are in this sense instrumental to come to terms with the disquieting, non-self-evident matching of Marxism and Latin America. Put differently, my work focuses on the conceptual displacements that the troublesome consideration of Latin America's particularities (vis-à-vis 'classical capitalism') aroused for the kind of Marxism elaborated by a number of intellectuals in the region – however marginal they might be considered at theoretical and/or political level.

I suggest furthermore that these conceptual disquisitions outline the contours of an 'intellectual constellation'. "Ideas are timeless constellations", Benjamin (1998: 34) stated in 1925 in reference to the German baroque drama. More modestly, I borrow this image-concept to make sense of a conglomerate of intellectuals and ideas that, despite of their temporal distance and disparate motivations, share similar preoccupations regarding the adoption of Marxism in and for Latin America. In this sense, they transcend their particular historical time and project the idea of a distinctive Latin American Marxism as a significant moment of Marxist elaborations in the region. The image-concept of intellectual constellation suggests

therefore a tradition of critical thought populating Marxism in Latin America, sometimes in subterranean ways, others more openly. Conversely, Benjamin's insistence on the 'now-time' of dialectical constellations<sup>7</sup> also affords to stress the potential actuality and timeliness of ways of thinking that could otherwise be regarded as bygone, to the extent that all of them pertain to the past century.

In my view, and notwithstanding the different epoch in which the reflections explored in this research were produced, the questions they raised (related to the character of our capitalist modernity; the value and function of Marxist theory and of socialist projects in this multi-faced region; its dependence on both economic and intellectual levels; the ill-resolved national and indigenous questions; the hetero-temporality of class struggle) are all-too present issues in Latin American societies – and elsewhere. In any event, this exercise of critical reading is premised on the following hypothesis: despite what official ideologemes assume or affirm, the now-time is not identical to itself; hence a newer account of previous approaches to prior conceptual work and political practice may indeed shed light onto present problems and demands.

The general orientations of this research demand a sort of 'Marxism of Marxism'. I consider that the particularization of the conceptual events gathered under the label of 'Latin American Marxism' requires the reconstruction of the conditions of possibilities giving way to those formulations. A 'Marxism of (Latin American) Marxism(s)' implies therefore an engagement with both the historical conditions of existence of Latin America and the theorizations thereby produced. A historical-materialist framework should then incorporate into the attempted intellectual reconstruction the history of class struggles, cultural imbalances, and material as well as cultural networks whereby these vernacular conceptualizations emerged. Thus understood, the 'context' (which I prefer to consider as the 'infrastructure' of Marxist theorizations) might undoubtedly occupy a more exhaustive place in this research; my aim is nonetheless to provide a sketch (if not a proper account) of these 'infrastructures' underlying Latin American Marxism.

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<sup>7</sup> In Benjamin's words, "[i]t's not that what is past casts its light on what is present, or what is present its light on what is past; rather, image is that wherein what has been comes together in a flash with *the now* to form a constellation. In other words, image is dialectics at a standstill." (1999: 462)

As Martín Cortés (2015: 15) puts it, the association of Marxism and Latin America is far from being self-evident; therefore, the insistence on this coupling requires some extra justifications. These are enveloped in Chapter I in terms of a projected theoretical task: Marxism's deprovincialization. I attempt to make sense of the continuous relevance that a subaltern, decolonizing perspective has for a truly emancipatory Marxist thinking. I concentrate my argument on the possibilities that an engagement with some postcolonial arguments offers to a decolonizing Marxist horizon. In doing so, the topics of the crisis of Marxism, capitalist temporalities, uneven and combined development, and the translational nature of historical materialism are framed in what I call a 'subalternist hypothesis'. I hope the reflections on these elements and dimensions contribute somewhat to the disruption of the pervasive, colonialist modes of representation underlying the uneven and combined mode of capitalist production, opening hence up the gaze for new readings of Marxist conceptualizations.

The selected corpus of Latin American Marxisms worked on in this research also needs further justification. Part I is compounded by Chapters II and III, in which a twofold account of José Carlos Mariátegui's Marxism is offered. In Chapter II, the argument focuses on the presence of uneven and combined development in Mariátegui's formulation of the dialectics between national and international dynamics, on the one hand, and of the autochthonous and the cosmopolitan elements of a socialist project, on the other. In doing so, I demonstrate that the nationalization of Mariátegui's Marxism operates through a notion of heterogeneous temporalities. Furthermore, I reevaluate in Chapter III the role that the category of myth plays in Mariátegui's Marxism, considered as an important dimension of the hetero-temporal insofar as it offers an understanding of the work of myth informed by Bergson's work of memory. In doing so, I argue that a definite conceptual sensibility towards subaltern temporalities, languages, and modes of production qualifies the approach to the 'national' for a Latin American Marxism. Mariátegui's political imaginary envisaged the theoretical encounter of Marxism with an indigenous revolutionary rationality, an encounter that adumbrated the idea of an 'Indo-American Socialism'.

In the second part, three different versions of the subalternist hypothesis are reconstructed. In Chapter IV, the question about the possibility for coming to terms

with the particular law of (under)development of Latin America's capitalism – as formulated by important exponents of the dependency school – offered an approach to critically consider the notion of development. Along with a general survey on the context and main events that gave momentum to a 'dependency hypothesis', the convergences and dissimilarities between the approach of the dependency school and the framework of uneven and combined development are conveyed by means of the reconstruction of the debate between Brazilians Fernando H. Cardoso and Ruy Mauro Marini.

A different but related conceptual sensibility can be found in Argentinean José Aricó's reflections on the misencounter between Marx (and Marxism) and Latin America. In his reading of Marx's 'symptomatic' text 'Bolivar y Ponte', Aricó envisaged more explicitly the misleading paths of an all-too Eurocentric conception of development. As a response, he articulated an interpretation framed under the conception of the autonomy of the political in order to coming to terms with both the seemingly exceptionality of Latin America and the main theoretical underpinnings of the 1970s' crisis of Marxism. Therefore, informed by an acute awareness (conceptual and practical) about the need of taking seriously into consideration the translational dimension when dealing with the relations between Marxist theory and Latin America, Aricó aimed to qualifying the crisis of Marxism with the need to incorporate the democratic question within socialist endeavours.

Bolivian René Zavaleta Mercado offered an alternative approach to deal with both the crisis of Marxist theory and the question of democracy, in a certain way similar to Aricó's, but differently premised and leading to dissimilar conclusions. The hetero-temporal condition of capitalism and its crisis, and the problems this condition poses for a self-knowledge of the working class, constituted a ubiquitous concern of his Marxism. Therefore, the term 'motley' (*lo abigarrado*) – which means disjointed, non-combined but nonetheless coexistent – becomes the guiding thread of Zavaleta's reconstruction of the Marxist apparatus for Latin America. From this reconstruction, a stimulating epistemological (i.e. related to the possibility of proletarian knowledge) as well as political (regarding the conditions for the working class' hegemony) discussion is open for the prospects of socialism in a 'backward' society. Zavaleta incorporated the twofold problem of temporalities and

of accumulation of popular memories in the midst of the consideration of the class-consciousness in conditions of uneven development. The democratic register this 'nationalization' of Marxism adopted, finally, affords a consideration from non-liberal perspectives, envisaging in my view a horizon of non-homogeneizing, non-reductive encounters between the working class and an emergent indigeneity.

Unlike what the organization of chapters might suggest, this research has tried to avoid a merely chronologically-sequential plot. On the contrary, I consider that each of these theoretical moments is crisscrossed by a plurality of temporalities that channel different memories of rebellion and resistance against both capital and its long-lasting colonial matrix. The common guiding-thread can nonetheless be identified in the colonial historical background that all these versions of Marxism sought to bring to the foreground so as to combat it. Their temporal eventuation, in turn, situates us predominantly within the decades of the 1920s, '60s and '70s. This is not fortuitous, since these were the moments in which the 'crisis of Marxism' (see chapter I) made itself felt at an epistemological level. In pointing out these continuities within discontinuity, I try to avoid a teleological emplotment that would figure a sequence of different 'stages' in Latin American Marxist thought, preferring instead to outline a constellation that works like a palimpsest. This, however, is not to spatialize history in the attempt to avoid a teleological temporality; as it shall become clear in the chapters, the spatial coordinates of these elaborations are first and foremost (unevenly and jointly) global, that is, trans-national, however they have been eventuated within national or regional frameworks.

As it perhaps could not be otherwise in a continent historically haunted by its own uneven-yet-combined development vis-à-vis the Euro-American 'West', these vernacular Marxisms (however felicitous or satisfactory their specific formulations might appear to the reader's eyes) outline a cartography of uneven and combined development for Marxist theory itself. Again, the aim is not to sketch any universal pathway of Marxism (however heterodox it may be) along Latin American lines, but rather to highlight the specificities of the selected intellectual trajectories, pointing further to some of the valences of the uneven-and-combined nature of Marxist theory itself (see chapter I).

This research attempts in consequence to provide a processual reconstruction of the selected theorizations. By processual reconstruction, I mean a way of thinking critically *with* these works rather than merely *from* them. That is, to critically think from within the intellectual spaces wherein they were configured and the problematics they elicited. More particularly, I have chosen to focus onto the encounters and misencounters between Marxism and Latin America, hence the engagement proposed here has to do first with the conceptual tensions and displacements these misencounters have brought about, and second with the encounters they produced, or at least envisaged. Thinking on and with theoretical encounters and misencounters makes it possible to discern the achievements and pitfalls of these vernacular Marxisms.<sup>8</sup> As Eduardo Viveiros de Castro argues, the transformation and even disfigurement of ‘initial’ contents (languages or theories) is inherent to any exercise of cultural translation: equivocations, in his words, are both the condition of possibility and the limits of any translational exercise (2004: 5). Put differently, equivocations cannot be corrected, even avoided, but only controlled by means of a sensible attention to the regimes and processes of translation involved in the exercise (see also De la Cadena, 2012: 51).

To processually reconstruct some of the conceptual tensions that Latin America has posed for Marxist theorizations in the sub-continent means to *think with* the history of encounters and misunderstandings between these terms. This, however, does not mean adopting a simple Latin-Americanism, as though the reference to the sub-continent’s reality were crystal-clear. Alberto Moreiras has advocated in this sense for a subalternist, ‘second-order’ Latin-Americanism, an anti-representational apparatus of epistemic disarticulation and disruption: “[i]n this sense, Latin Americanism works primarily not as a machine of epistemic homogenization but potentially against it as a disruptive force, or a wrench, in the epistemological apparatus, an antidisciplinary instance or Hegelian ‘savage beast’ [...]” (2001: 33). In my research, however, the idea of an anti-representational approach to Latin-Americanism is aimed at contributing to the clarification of some

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<sup>8</sup> Martin Savransky refers to the productivity of thinking with encounters in the following terms: “an en-counter is, in the most general sense, a meeting of heterogeneous elements. Thus, it designates, first and foremost, a mode of relationality characterised by the contingency of a coming into contact of various forms of mattering or patterns of relevance.” (2016: 90)

of its organic, symbolic and conceptual relations across 'national' formations and formulations. Accordingly, this work draws on 'trans-national' perspectives and hence promotes a renewed sensibility towards trans-cultural tendencies or experiences, so as to break up with the barriers posed by methodological nationalism, but without falling back neither into essentialist, a-critical regionalisms nor the temptations of abstract cosmopolitanisms.

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'The Misadventures of Latin American Marxism', the title of this research, directly borrows the gesture of Maurice Merleau-Ponty's famous work *Adventures of the Dialectic*. In the Epilogue to that work, the French Marxist phenomenologist says that "[t]here is dialectic only in that type of being in which a junction of subjects occurs, being which is not only a spectacle that each subject presents to itself for its own benefit but which is rather their common residence, the place of their exchange and of their reciprocal interpretation." (1973: 204) And of misunderstandings, one might add, in an effort to also take equivocations and mistranslations into consideration. The choice to describe the intellectual journeys selected in this research as 'misadventures' thus stresses the stubbornness of reality itself, that is, its refusal to be subsumed into universal grammars of class struggle.

Summarizing, the central aim of this research lies in the visibilization of Latin American Marxism as a constellation of ideas (concepts, authors, and currents) within Marxist elaborations in the sub-continent; an intellectual constellation that finds in the (mis)encounter between Marxist theory and Latin America a pathway to contribute to the invigoration of Marxism's critical scope towards its deprovincialization. The themes and results of these formulations will be conducted by processual reconstructions of the misencounters and encounters that gave them life, so as to grasp them as theoretical events bringing to the forefront the questions of Marxism's crisis, uneven and combined development of capitalism, plural temporalities, and the tasks of translation. Benjamin's conception of constellations – timeless *and* timeliness – affords for a reading of Latin American Marxism also capable of informing some present-day emancipatory demands, particularly for the

Global South. From the interstices and fissures of the matching between Latin America and Marxist theory, the problematic envisaged by the question on 'Latin American Marxism' might contribute to the decolonization of Marxist theory, that is, of what Sartre famously called 'the unsurpassable horizon of our times' - times that, needless to say, have not as-yet come to an end.

## I. Conceptual Paths in the Deprovincialization of Marxism

'In 1921 Vilich [Lenin], in dealing with organisational questions, wrote and said (more or less) this: we have not been able to 'translate' our language into those of Europe. [...] It seems that one may in fact say that only in the philosophy of praxis is the 'translation' organic and thoroughgoing, whilst from other standpoints is often a simple game of generic 'schematisms'.'

Antonio Gramsci, *Q 11*; §46, 47

### 1. On Marxism and its Ongoing Crisis

Besides the difficulties of bringing together Latin America and Marxism, a sagacious reader might ask: 'But... was not Marx *dead*, and all of his epigones together with him? Was Marxism not already unsustainable as historical explanation, let alone as a veritable perspective for popular struggles?' Certainly, much of the reflection in the 1990s and 2000s revolving around the 'crisis of Marxism' - be it in poststructuralist or postcolonial registers - seemed to suggest so. Marx's hauntology, inaugurated by Derrida ([1993] 2006) and accompanied by the echoes of Fukuyama's 'end of history' ([1992] 2006; cf. Anderson, 1992) as well as by Laclau and Mouffé's post-Marxism 'without apologies' (1987; see also Laclau and Mouffe 1985), marked an epoch in the contemporary reflections about Marx's legacy. In the aftermath of the collapse of 'actually-existing socialism', Marxism's death-certificates proliferated in academic circles and mass media alike.<sup>9</sup>

Nonetheless, Marxism has arguably lived or survived in a sort of permanent crisis *since the very outset*. Crisis locates indeed at the very core of the 'new materialism' opened by Marx and oriented to constantly re-turn to and re-

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<sup>9</sup> The point here is not Derrida's argument about Marx as 'spectre' itself, but rather some of its broader intellectual effects. Derrida's *Spectres of Marx* remains in my view a significant hallmark for (Marxist) reflections about the non-identity of present time or, as Althusser put it, the overdetermination of temporalities structuring the present of a historical conjuncture.

inaugurate its commitment to reality.<sup>10</sup> This is, in my view, the heart of his 1845 theses on Feuerbach, in which Marx proposes that the reality of thought is decided practically, not theoretically (Thesis 3),<sup>11</sup> and where the dialectic of interpretation/transformation indicates that a non-transformative thought (concomitant of a passive subjectivity) is always partial, incomplete, and at the end of the day false (Thesis 11).<sup>12</sup> In these profoundly self-critical statements, Marx offered a revolutionary way for ‘philosophy’ to come to terms with ‘the world’ in an active, transformative manner, at once mercilessly criticising contemplative knowledge (as ‘mere’ speculation) and benefiting from the latter’s truth-contents.

Following Stathis Kouvelakis (2008), I conceive Marxism’s ‘crisis’ as a conjuncture of self-problematization of its core philosophical premises, principal hypotheses and analytical tools. These are moments of controversy internal to Marxist theory, conceptual crucibles in which the productivity of the paradigm is put on hold and critically judged. In a similar vein, Fredric Jameson relates the most intense of these moments (from which there emerged various ‘post-Marxisms’, from Bernstein’s to post-structuralist endeavours) to world-historical conjunctures marked by profound capitalist reorganizations. Jameson highlights the intrinsic relation between capitalism’s inherent contradictions and crises, on the one hand, and Marxism as its critical “science”, on the other (1996: 1). The Bolivian theorist René Zavaleta Mercado (2013a: 608) asked in 1983 about the appropriateness of speak of the ‘crisis’ of an idea (Marxism) that has chosen to exist in such a form, making thus clear that crisis is not exceptional but willingly constitutive of Marxist theories. Contemporarily to Zavaleta, one of the more synthetic descriptions of this ‘constitutive’ moment of crisis was provided by Althusser: “[t]his is what also

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<sup>10</sup> As George Tomlinson puts it, “[i]n his transformation of a distinctly epistemological problematic, Marx enables the construction of a concept of practice which moves dialectically and unevenly between epistemology and ontology.” (2014: 278) For the perspective of the ‘young Marx’, see M. Löwy (2005b) and S. Kouvelakis (2003, ch. 5). For the ‘late Marx’, see T. Shanin et.al. (1984). For a well-informed and thought-provoking survey on Marx’s whole trajectory, considering his continuities as well as discontinuities, see K. Anderson (2010).

<sup>11</sup> “The question whether objective truth can be attributed to human thinking is not a question of theory but is a *practical* question. Man [sic] must prove the truth, i.e., the reality and power, the this-worldliness of his thinking in practice. The dispute over the reality or non-reality of thinking which is isolated from practice is a purely *scholastic* question.” (Marx, in Marx and Engels, 2010c, 5:3 original emphasis).

<sup>12</sup> “The philosophers have only *interpreted* the world in various ways; the point is to *change* it.” (Marx, in Marx and Engels, 2010c, 5:5 original emphasis),

explains the fecundity of Marxism. Stillborn as philosophy, saved as historical genesis of the struggle and formation of classes, *its whole destiny plays out in this in-between.*" ([1982] 2012 original emphasis)

From this perspective, the entire history of Marxism during the 20<sup>th</sup> century has taken the form of an ongoing crisis. This long-lasting 'internal' problematization involved Bernstein, Kautsky, Luxemburg, Sorel, Labriola and many others during the early-twentieth century (in the wake of the turn from national to imperialist capitalism); and later Lukàcs, Korsch, Mariàtegui, Bloch and Gramsci, to name only some of the most prominent figures. This status of Marxism was once again actualized by Althusser at the end of the 1970s, in the moment of constitution of a world-system under the hegemony of multinational corporations. In such a context, Althusser provided the contours of a crisis that continues up until our present, post-actually-existing socialist times. Undoubtedly, the collapse of Soviet bloc has contributed to open the field for novel and renewing approaches to 'actually-existing capitalism', released (at least partially or potentially) from the ubiquitous presence of a congealed, well-established 'orthodoxy', the one Marcuse (1961) called 'Soviet Marxism' and which is broadly identified under the label of Stalinism.

In the present conjuncture, it seems to me productive to engage in new readings of the heterogeneous Marxist tradition, so as to display the tensions constitutive of its alleged *doxa*. Within the Marxist tradition, similar self-critical exercises have often taken the form of a return to some departure-point (be it Marx and Engels themselves, Hegel and the Hegelian dialectic as Marxism's problematic background, or Lenin and/or any of the assorted 'Leninisms') in order to re-cognize what the outcomes and pitfalls of such an intellectual tradition have to teach us for present-day demands. In my case, I have chosen to focus on Latin American Marxism as an intellectual constellation which (I hope my work helps make visible) was traversed by a shared set of questions and perspectives built in permanent dialogue with formulations and debates occurring in other sites of the continent and the world.

Latin American Marxism will be delineated in this work as an *intellectual constellation* - more than as a self-evident tradition - within Marxist debates and conceptualizations. The claim for the existence of such geographically-based

intellectual tradition is of course troublesome in itself – just like the label of ‘Western Marxism’ popularized by Perry Anderson. Anderson (1976a: 1) identifies Western Marxism as a “common intellectual tradition”. What I find particularly disquieting (and symptomatic) is the unproblematic consideration of the West as identical to itself. This is apparent in the treatment of this tradition of thought. When did Gyorgy Lukàcs become a distinctive ‘Western’ thinker? Did not Althusser and most of his generation draw heavily upon Mao-TseTung and the ‘cultural revolution’, just like Sartre did upon Fanon’s anti-colonialism? Was not C.L.R. James a ‘Western’ Marxist? If we consider the West as the projected existence of a (modern/colonial) *centre*, in this case of Marxist theory, then a renewed Marxism cannot but recognize the locus of power implied in such sort of accounts. However, leaving aside the pertinence of some of the readings of the authors dealt with in his account, Anderson’s work is important in what, in my view, remains its best achievement: the critical reading of a ‘provincial’ version of Marxism. The next step further, the deprovincialization of that version of Marxism, is the lost step in his reflections (see Harootunian, 2015, Introduction).

## **2. Towards a Subalternist Hypothesis**

The focus of this research is posed on a ‘provincial’ version of Marxism to contribute to the dialogue between putative centres and peripheries within Marxist theory. In doing so, I propose to bring to the fore some of the reflections set up by the so-called ‘postcolonial reason’ in order to clarify what, in my view, is an important dimension of the ongoing crisis of Marxism in vast areas of the Global South. Varieties of Marxisms – political movements as well as forms of intellectual and theoretical resistance (cf. Jameson, 1996: 3) – seem to have developed through similarly overdetermined processes in South-Eastern Asia and Latin America. Two determinations were in my view crucial in these processes. On the one hand, there are those nationalist movements sprung up in most of the then-called ‘Third world’ (now Global South) during the twentieth century. On the other, the rapid processes of ‘bolshevization’ (a catch-name for Stalinization) of the Communist parties in these regions. The latter transformed to an important extent many of these

organizations into satellites for the USSR's foreign policies, helping thus to disseminate a particular version of dialectical and historical materialism.

With significant exceptions, the official ideology of international Communism in the Global South was by and large built upon a reduction of the dimensions of class struggle to a rigid concept of 'class' as an economic subject framed into a pre-determined, linear conception of 'national' development. Stalin's 1925 decree of 'socialism in one country' as the URSS state-policy certainly contributed to reinforce such stage-based ideology of national modernization from feudal to capitalist to socialist. For the Latin American case, Löwy points out that the first significant polemic within communist organizations revolved around the "nature of the revolution": bourgeois-democratic or socialist (1992: xiv-xv). From the viewpoint of official Marxism, a Latin American revolution ought first to accomplish the bourgeois and democratic tasks as well as to allow for the consolidation of capitalist productive structures. Along similar lines, the Subaltern Studies can be recognized by the intense criticism of the predominance of nationalist agendas in bourgeois as well as Marxist historiographies of India. In particular, Ranajit Guha famously confronted Eric Hobsbawm's definition of non-capitalist, traditional forms of discontent such as social banditry as "pre-political" (Hobsbawm 1999: 5). The Indian historian, in turn, read this indication as the pre-supposition of a predominant class/nation developmental axis in which the proletariat assumes the role of prototype of a 'national' class. In other words, Hobsbawm's definition of 'pre-political' (i.e., devoid of ideology, organization and programme) makes apparent the all-too Western division-line that configures the modern political reason. In doing this - Guha concluded - Marxist historiography colludes in colonial commitments with nationalist-elite historical accounts. Such a criticism inaugurated a line of reflection which, by searching for a reading of history 'against the grain', could free historical accounts of subaltern movements from the modernization templates and national narratives that furnished leftist policies during the last century.<sup>13</sup>

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<sup>13</sup> Guha differentiates between 'elites' striving for the building of the colonial state (and thus writing state's history) and 'the people' -the subalterns- defined in terms of the "demographic difference" (1982: 8) from the latter. For a survey of the displacement from the Gramscian category of 'subalternity' as relational, historic qualifier adjective, to

Two decades after Guha's intervention, Dipesh Chakrabarty's *Provincializing Europe* brought the subalternist argument forward to a further level. In a reading of Marx's *Grundrisse* highly informed by Althusser and Toni Negri, yet complemented by a Heideggerian lens,<sup>14</sup> the author establishes that two different temporalities play out in post-colonial capitalism. He distinguishes between living labour or labour-for-itself and abstract labour or labour-for-capital, each of which pertains to irreducible manners of temporalizing history. Therefore, he proposes to distinguish History 1 or "history posed by capital", on the one hand, and History 2 or "histories that do not belong to capital's life process", on the other (Chakrabarty, 2000: 50) This is perhaps an idiosyncratic way to say that there are structures necessary for capital's reproduction while other are not, as Vivek Chibber (2012: 225) argues. Nonetheless, Chakrabarty's argument is more concerned to identifying the traces of a model somehow internal to History 1 in Marx's own discourse, so that Marxist theory is criticized for its commitment to capital's structure of temporalization and historicization. In doing so, Chakrabarty orients his criticism towards the collusion of Marxism's hegemonic version with a conception of history that pertains to the dominant classes – namely, *historicism*.

Historicism is defined by Chakrabarty as "the idea that to understand anything it has to be seen both as a unity and in its historical development"; from this idea derives the projection of a modernity that occurred "first in the West, and then elsewhere", by a process of diffusion and spreading of modes of relationship and beliefs that are originally Western (2000: 6). This is what Johannes Fabian, discussing the case of anthropology, called "the denial of coevalness" or "allochronism", the operation through which spatiotemporal distance functions as an epistemological *dispositif* of otherness and subalternization. But it is also akin to the notion of historicism that Benjamin saw as the main polemical target of the materialist historian, for instance, in his notes entitled 'Paralipomena to "On the Concept of History"': "A conception of history that has liberated itself from the schema of progression within an empty and homogeneous time would finally

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'subalternism' as a noun or condition, see M. Modonesi (2014: 30). For an insightful re-reading of the 'pre-political' in the Hobsbawm-Guha debate, see A. Toscano (2010: 44–57).

<sup>14</sup> Chakrabarty turns to Heidegger's notions of 'fragmentariness' and 'not-yet' in order to "find a home for post-Enlightenment rationalism in the histories of Bengali belonging" (2000: 21–22).

unleash the destructive energies of historical materialism which have been held back for so long.” (1996a: 406) Sharing none of his revolutionary urgencies, Chakrabarty (2000: 23) recalls Benjamin’s historicism so as to couple the critique of ‘progress’ with the critique of ‘development’.

Chakrabarty contributes significantly to identifying the complicities among capital, nation-state narratives, and the teleological version of Marxism predominant in vast areas of the Global South. More specifically, from his contribution it is possible to problematize the existence of different structures of temporality enmeshed in those zones of the world where capital’s subsumption or annihilation of traditional ways of worlding remains incomplete. Conversely, the interpellation-effects of historicism (“[t]hat was what historicist consciousness was: a recommendation to the colonized to wait”, 2000: 8) rings particularly loud in the memory of Latin American settle of accounts with its own ‘orthodox Marxisms’. The ‘first in the West, then elsewhere’ that characterizes capital’s imperial grammars (historicism in Chakrabarty) and was adopted by nationalist agendas, was mimicked and hence reinforced by Marxist ideology of a stage-led historical course from pre-capitalist to capitalist (and eventually, to post-capitalist) phases.

I find it productive to re-initiate the (critical) dialogue with those ‘History 2s’ that remain partially enclosed in subaltern traditions of resistance and struggle, traditions coeval to national formations and imperial or multinational powers. In this sense, the value of Chakrabarty’s insights does not rest so much in the accuracy of his conceptual formulations but in his resistance to the subsumption of subaltern ways of worlding and worldviews into a narrative of national edification and integration. What, in other words, becomes visible in his reflections is the necessity to bring to the fore the decolonization of knowledge from the prison-house of capitalist, putatively Western temporalization of life, as an ineluctable task for our times -a task which, in turn, demands piecemeal critical reconsiderations of the narrative of development and progress entailed in both national and Marxist narratives. John Kraniauskas refers to the task envisaged by the subalternist perspective in terms of the “disjunctural critique of the total apparatus of development” (2005: 54). This is what I will call from now on ‘subalternist hypothesis’.

In my view, one of the dimensions of the current crisis of Marxism, at least in the Global South, rests on the dead weights that its formation as a variety of development or modernization theory imprinted in the popular grammars of these peoples. What arguably framed both nationalism and 'orthodox' Marxism in vast areas of the periphery was a development narrative built upon the lines of capitalist modernization processes; a narrative in which non-capitalist social elements were considered archaic, backward, hence predestined to be left behind. Of course, it was not only a narrative, but a whole set of policies, mobilizations of resources and ideologies. The emphasis on the narrative aspect is intended to highlight the ideological moment, that is, the crystallization of an image of historical development in the 'consciousness' of the working and other popular classes – or in what we might call, following Gramsci, the 'grammar' of the subalterns (more on this below).

Inscribing this research in the perspective of Marxism's deprovincialization, my recourse to a 'subalternist hypothesis' searches to retain the tensions between History 1 – capital's tempo, historicism – and the fragmentary, disjointed set of worlding practices and worldviews implicated in History 2 – temporalities subaltern to capital, that is, but not essentially different nor irreducible to other than themselves. In doing so, I follow the works that have attempted a critical but productive engagement between Marxism and postcolonial inquires.<sup>15</sup> Harry Harootunian says in this regard that "[d]eprovincializing Marx entails not simply an *expanded geographic inclusion* but a *broadening of temporal possibilities* unchained from a hegemonic unilinearism." (2015: 2 emphasis added) It is a unilinearism shared by various self-declared revolutionary nationalisms as well as orthodox Marxisms. I agree with Neil Larsen when he indicates that postcolonial perspectives make "one step forward" in identifying this ideological complicity as a critical node of emancipator ideologies in the Global South; and – Larsen goes on – these perspectives make "two steps back" when the critique conspicuously avoids class-analysis (2001: 35). The problem, however, seems to me to be precisely whether

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<sup>15</sup> See for example C. Bartolovich and N. Lazarus eds. (2002); B. Parry (2004); J. Kraniauskas (2000, 2005), N. Lazarus and R. Varma (2008); K. Linder (2010).

Marxism is still able to offer a non-reductionist and non-deterministic framework for the sort of class-analysis needed today.<sup>16</sup>

I propose to seize upon the notion of ‘subaltern’ to give account of the ways of worlding, worldviews and structures of temporality whereby a class becomes – or not – a distinctive socio-political subject. As the condensation of social (hence historical) relations at a highly overdetermined level, a class might be understood as shaped by multi-layered experiences of proletarianization and de-proletarianization, of subalternization, resistance and antagonism (and eventually, autonomy) to capital’s rule. This is especially so in the less-favoured areas composing the uneven-and-combined developmental landscape of capitalism at a world scale, and composes what I figure as hetero-temporal conjunctures through which class-struggle is conducted.

In what could seem at first glance as a mere coincidence, Harootunian (2015: 115ff) points out in this regard the contemporaneity of Gramsci’s *The Southern Question* and Mariátegui’s *Seven Interpretive Essays*, two works in which the problems of subalternity were unfolded under the frame of the ‘national question’. Having the conceptual coincidences between these two authors been profusely analyzed by Mariateguista scholars (see next chapter), this semblance is also indicative of the presence of a hypothesis that, within Marxism, has worked to destabilize and re-think the Marxist concept of class itself, from the standpoint and conditions of the Global South. As the next chapter addresses, the consideration of the North-South division proposed by these Marxist intellectuals invites to reconsider the geopolitical dynamics of capital under imperialism; at the same time, it projects Marxist theory beyond fetishistic formulations ingrained in Eurocentric premises, envisaging the conception of a plurality of different temporalities coming

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<sup>16</sup> I tend to agree with James Martin when, commenting on Marx’s ‘Eighteenth Brumaire’, he states that “[t]he problem with class analysis lies in its abstract and reductive character. Whilst it is possible to abstractly identify different class positions in relation to a capitalist economy, any concrete analysis has to take into account a wider variety of social forces that do not easily fall into a ‘proletarian’ or ‘bourgeois’ camp. [...] This is not to say that ‘class’ is not at times a useful shorthand for a variety of phenomena. But it is an imprecise shorthand and fails to fully grasp the character of different social identities and antagonisms. Few post-Marxists would deny the class divided character of capitalism. But to say that classes are the major social forces upon which the entirety of society is built is a different matter altogether. [...] We may classify the distribution of certain of the benefits and losses of capitalism in terms of classes but this does not make an automatic case for political agency.” (2002: 133).

together and pressing upon the current situation. Harootunian concludes that, from Gramsci and Mariátegui, the idea of a 'South' functions less as a geographical location of backwardness or belatedness and more as a particular temporal register, or set of registers of different nature. In this sense, the appellation to the Global South in this thesis is intrinsically tied to the idea of hetero-temporality that characterizes capitalist modernity.

### 3. Marx and the Critique of Capital's Tempo

What seems to me at stake in most postcolonial arguments is the misrecognition of the fact that Marxism *is and has been*, at least to a certain extent, an intellectual tradition committed to a critique of capital's temporality and its modes of historicization. However, as Althusser recognized as early as in 1965, this topic has not been clearly articulated, and sometimes not even fully acknowledged as a conceptual problem (cf. Althusser, 2009 Part II. 4). Perhaps one of the most accomplished among poststructuralist and postcolonial endeavours has been the deconstruction of the conception of a linear, homogeneous time, a mirror-conception for the ideological time of capital. However, similar procedures can be found as earlier as the young Marx, for instance in his reflections on the economic and political backwardness but nonetheless philosophical coevalness of Germany, when compared to 'advanced' England (economically) and France (politically) –that is, the first 'Marxist' ruminations on the multiple character constituent of modern temporality. In the 'Contribution to the Critique of Hegel's Philosophy of Law. Introduction', of 1843, Marx stated that "Germans have gone through our posthistory in thought, in philosophy. We are philosophical contemporaries of the present without being its historical contemporaries." (Marx and Engels, 2010b, 3:180)

Furthermore, 'The Eighteenth Brumaire of Louis Bonaparte' affords a critical reading of the different and uneven structures of temporality that, in their disjointed interaction, overdetermined the political conjuncture of post-1848 France, leading to the ascension of Napoleon III to power. A conjuncture in which the capitalist order appeals to the past (to Napoleon, that is, by means of his farcical projection onto his nephew Luis Bonaparte) in order to secure the present and prevent it from its own

(proletarian) future. As Massimiliano Tomba puts it, the great innovation of this text rests on “the duplication of historiographic registers. Instead of relegating the tradition into the past, [Marx] grasped its specific temporality as the past-present.” (2013: 43–4) In a similar vein, Bob Jessop argues that periodizations and chronologies are of different nature:

[W]hereas a chronology orders actions, events, or periods on a single unilinear time scale, a periodisation operates with several time scales. Thus the *Eighteenth Brumaire* is replete with references to intersecting and overlapping time horizons, to unintended as well as self-conscious repetitions, to dramatic reversals and forced retreats as well as surprising turnarounds and forward advances, and to actions and events whose true significance would only emerge in the ensuing train of events. (2002: 184)

The main temporalities clashing here are, on the one hand, the conservative-revolutionary temporality represented by the bourgeoisie alongside the peasants (anxious to hold land titles), or ‘temporality of hoarding’, on the one hand, and the suspended proletarian-revolutionary temporality of moving-forward self-criticism, or ‘temporality of distillation’, on the other.<sup>17</sup> The absent subject of this story narrated by Marx – the working class – lurks ubiquitously behind the scene, just because what is being confronted in this text is the history made against the class-struggle as aroused in 1847-1848. The Second Empire thereby becomes the spectral, phantasmagorical (Tomba 2013, ch. 3) stage in which class-struggle – along with the disjointed temporalities that determine it – is (farcically) represented.

To break with the bourgeois conception of history was therefore at the centre of Marx’s intellectual concerns. As Massimiliano Tomba (2013, 55) explains it, Marx “reasons with a plural semantics of history: he counterposes a notion of history marked with fractures to the history of continuum. This contraposition is political: it grows out of the search for a revolution capable of interrupting that continuum.” In turn, Daniel Bensaïd (2009: 80, 77) recognizes that Marx’s *Capital* is nothing but an

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<sup>17</sup> Of course, this aggregation implies a complex set of temporalization partially converging in a determinate conjuncture. I’m borrowing Amy Wendling’s (2003) terminology of ‘hoarding’ and ‘distilling’ to speak of the two main temporalities at stake in Marx’s text.

exploration into the pluralization of duration through a critique of capital-time. According to his reading of Marx's *magnum opus*, 'capital' appears as a specific and contradictory organization of social time based on the appropriation of surplus-value, that is, non-remunerated work-time. Along the volumes of *Capital*, Marx's account goes from the mechanical-linear time of production (volume 1) to the chemical-cyclical time of circulation (volume 2) to the organic time of reproduction (volume 3), the latter permanently menaced by the disruptive-yet-constitutive time of crisis. "Marx", Bensaïd concludes, "deconstructs the notion of universal history" rather than reinforces it. And what emerges from the ruins of universal history "is a rhythmology of capital" (2009: 32, 35). A rhythmology that, as Tomba points out, is not a "mosaic of temporalities" insofar as they do not dwell indifferently to one another; rather, "the real problem is their combination by means of the world-market's mechanisms of synchronisation." (2013: xiv)

I draw upon Tomba's notion of synchronization, which itself draws on Ernst Bloch's account of non-contemporaneity and its dialectic, in order to identify the structural<sup>18</sup> instance in which different, uneven and combined temporalities incorporated into the capitalist world market –where the foremost 'synchronizer' is the law of value. Bloch termed 'multi-level dialectics' the methodical recognition of contradictions that are synchronous –roughly, capital against living labour– as well as non-synchronous ones –capitalism against intermediate elements or 'remnants'. The source of non-synchronous contradictions "is a past which, in places, is not only not past in terms of classes, but not even completely redeemed materially" (1977: 35). Existing along the lines of the synchronous contradiction, those non-synchronous elements may be driven against either the bourgeoisie or the proletariat; the prospect of a proletariat hegemony, therefore, "cannot be managed, especially if the hegemony is to be undiluted and secure, unless dialectics also thoroughly 'masters' the material of nonsynchrononism and its heterogeneous contradiction." To 'master' non-synchronicity means, for Bloch, to possess it "in the actual heritage of its ends in the Now", that is, to gain "additional revolutionary

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<sup>18</sup> I follow here Peter Osborne's (2015) critical remarks on Tomba's work. According to Osborne, the key caveat to bear in mind when using Bloch's categories lies in the conceptual distinction between the axes of synchronous/non-synchronous ('structural' differences of temporalities, which is Tomba's framework), simultaneous/non-simultaneous (rather a chronological organizer), and contemporaneous/non-contemporaneous (which corresponds to a complex and multi-layered register of the temporal matrix).

force from the incomplete wealth of the past, especially if it is not ‘sublated’ in the last stage.” (1977: 36, 38)

In turn, in Tomba’s argument “capital organises and synchronises different temporalities according to the dominant temporality of *socially-necessary labour time*.” (2015: 84, original emphasis) This does not imply the complete subsumption of non-capitalist temporalities, but undoubtedly remains a violent form of imposition: “the indifferent sociality of abstract labour destroys the previous community-relations and the multiplicity of the differences between the particular spheres of society, producing a *new, radical difference*: that between capital and wage labour.” (Tomba, 2009: 51) Thus, the violence of what Marx called original or primitive accumulation – i.e. homogenization of populations through dispossession – prepares the ground for the rule of the law of value as ‘economic’ synchronizer at the level of the world market.

Tomba also recognizes a second, *extra-economic* synchronizer in the nation-state form; insofar as the value of the socially-necessary labour time is not a given but its determination “contains a historical and moral element” (Marx, 1976: 275), the more concrete dimension in which capital organizes itself to confront class-struggle is the nation-state. State ‘extra-economic’ violence, in his view, is the way to synchronize the contingent combination of different temporalities “in order to produce differentials of surplus value”, and hence to concur to the market’s competition so as “to be synchronised to the world-rhythm of socially-necessary labour.” (Tomba, 2009: 56).

Last but not least, there are the texts (reading notebooks, letters or letter drafts, editorial sheets, and the like) written by Marx in the last decade of his prolific life, that is, between the defeat of the Paris Commune in 1871 and his own death in 1883. By and large unpublished during Marx’s lifetime, they are perhaps the writings in which the non-linear conception of development he achieved throughout his work is exposed in a more definite form. These texts show the increasing concern with the agrarian commune in general, and particularly the Russian *obshchina*. As we will see in this research, these texts have been of enormous significance for Latin American Marxism, for instance in the surprisingly similar perspective displayed by Mariátegui, even when the latter could not be aware of these texts’ existence; or the work made by Aricó on this ‘fragmentary’ part of Marx’s work. Regarding the

evolutionary possibilities of development for such a communal form, Marx wrote (in the Third Draft, never submitted, of his 'Reply Letter' to Russian *Nardonik Vera Zasulich*) that it

occupies a unique situation without any precedent in history. Alone in Europe, it is still the organic, predominant form of rural life in a vast empire. Communal land ownership offers it the natural basis for collective appropriation, and its historical context –the contemporaneity of capitalist production- provides it with the ready-made material conditions for large-scale co-operative labour organised on a large scale. It may therefore incorporate the positive achievements developed by the capitalist system, without having to pass under its harsh tribute [...] it may become the direct *starting-point* of the economic system towards which modern society is tending; it may open a new chapter that does not begin with its own suicide. (1983: 121).

According to Marx (1983: 124), the destiny of the Russian community was not written in the stars; just as it had been the product of specific historical conditions and constraints, its future depended on its ongoing success in resisting the challenges of a present increasingly characterized by the alliance of large landowning and capital. The acknowledgment of the non-inevitability of the 'harsh tributes' that capitalist development imposes to the prospects of a post-capitalist production advances a multilinear perspective on the basis of which the late Marx considered the increasingly global capitalist structure in its uneven (multi-layered) and combined (coeval) contradictory modes of operation.

This brief survey shows that Marx's original contributions were far from a mere unilinear conception of historical time, although of course one could find instances of such unilinearism, in the *Communist Manifesto* as well as other texts written by him or co-authored by Engels. The reduction of Marx's perspective to a set of sequential stages led by deterministic forces was grounded in the pervasive Eurocentrism of the socialist movement's politics and worldviews. Insofar as his analysis of capital and capitalism became more and more complex, Marx's image of modernity appears as a force-field in which different structures of temporalization

are tendentially subsumed by capital's, as the latter's pace goes on covering the entire world.

#### **4. The Uneven and Combined Development of Capitalist Modernity**

To recall once again Bensaïd's elegant formulation of the point: from the ruins of universal history, what emerges is the rhythmology of capital –and, along with it, of its 'counter-times'. To unveil capital's self-narrative of progress and development is a crucial moment of the critique to capital, a moment in which the nature of capitalist accumulation, production and reproduction is revealed as the source of unevenness and asynchronies. This criticism opens in turn the analysis towards the intersection of different temporalities in permanent tension, negotiation, and resistance, to be subsumed by capital-in-development. As Perry Anderson argued, modernity itself is no other than an overdetermined configuration at the intersection of different historical temporalities (1984: 104). Dialoguing with this and other formulations about the subject, Peter Osborne adds that the concept of modernity, in both its philosophical discourse (e.g., Habermas') and as structure of historical consciousness, is founded on the colonial experience; in Osborne's words,

it was through the temporalization of the founding geopolitical difference of colonialism that the concept of modernity first came to be universalized, and thereby, thereafter, to subordinate the differential between itself and other 'times' to differences within a single temporal scheme of 'progress', 'modernization' and 'development'. (1995: 21)

The considerations on Marx's criticism of capital tempo, its structures of historical consciousness, and the colonial matrix from which it derives, seems close to the framework of uneven and combined development, as well as to the subaltern hypothesis. In this regard, I draw upon Gramsci's ruminations on subalternity in the *Prison Notebooks*. In *Quaderni 3*, the heading of §14 reads 'Storia della classe dominante e storia della classi subalterne'. The first feature worth noticing here lies in the declared relationship of both histories, and thereby the concomitant nature of the categories of 'subaltern classes' and 'dominant class'. The second refers to the plurality implicated in the notion of subaltern, as Gramsci explains:

The historical unity of the ruling classes is realised in the State, and their history is essentially the history of States and of groups of States. [...] The subaltern classes, by definition, are not unified and cannot unite until they are able to become a 'State': their history, therefore, is intertwined with that of civil society, and thereby with the history of the States and groups of States. [...] The history of subaltern social groups is necessarily fragmented and episodic. (2003: 52, 54–5)

In this passage, Gramsci highlights the heterogeneity and fragmentariness of subaltern classes' history. One could say, first, that the only possible unity for the subaltern classes is a negative one, that is, a unity built along the lines of the dominants, of the actual 'state'. But, second, he characterizes the (plural) history of subaltern classes as 'intertwined with' the history of civil society *and through it* with the international scenario of States' relations.<sup>19</sup> Gramsci indicates, on the one hand, that the 'national' character of subaltern groups is framed under the ruling classes' unity, in the form of a civil society that corresponds to the unity of a determinate state. At the same time, on the other, the 'international' stage is incorporated as a determinate dimension interplaying within the dynamics of such national society.

Elsewhere, in a telling fragment-passage on the 'History of subaltern classes' (Q 7, § 51), Gramsci interrogates the importance of the racial and colonial question in the process of 'nationalization' undergone by subaltern classes in France: "[t]he element of racial conflict that Thierry inserted into class conflict in France: what importance has it had, if any, in France, in determining the nationalistic bent of subaltern class movements?" (2011: 197) What this question introduces is the concern by the incorporation of the international (e.g., the colonial) into the analysis of the national class configurations and class-struggles, the manner and magnitude by which the uneven and combined structures of the international setting intervene in the formation of 'national' classes. I suggest here, in other words, that Gramsci's notion of subalternity demarcates the 'national' character of the latter in the dialectic of domination and subalternization while, conversely, it brings the 'international' or

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<sup>19</sup> 'Thereby' is a rather ambiguous translation for Gramsci's locution '*per questa via*' (cf. Gramsci 1977b: 2288), which can be more emphatically rendered as 'in this way' or 'through which'.

inter-state configuration into the picture, as a determinate dynamic factor of the 'national' itself (more on this below).

In *Quaderni* 14, §68, Gramsci returned to the national/international problem pointing to one of the main polemics of international communism at that time: the possibility of socialism 'in one country', as proclaimed by Stalin in 1925 and confronted by Trotsky's theory of permanent revolution. According to Gramsci:

The problem which seems to me to need further elaboration is the following: how, according to the philosophy of praxis [...] the international situation should be considered in its national aspect. [...] To be sure, the line of development is towards internationalism, but the point of departure is 'national' –and it is from this point of departure that one must begin. Yet the perspective is international and cannot be otherwise. (2003: 240)

Recognizing the uniqueness of every 'national' configuration (i.e., the particular set of dynamics of domination/subalternization) and hence the theoretical and political necessity for Marxism to methodologically take it up as departure point, Gramsci nonetheless sketched a conception of subalternity that advocates for an international perspective. Commenting on this passage, Peter Thomas concludes that Gramsci's "concept of [proletarian] hegemony is the concrete nationalisation of the international perspective –which can only be considered concretely in its 'national' aspect" (2010: 216). All of which seems closely related to the framework of uneven and combined development, though Gramsci explicitly questions the 'political' side of this idea (as formulated by Trotsky in terms of the 'permanent revolution') as an adequate strategy for proletarian hegemony in the 'West'. Thomas points out that the notion of 'West' (like its counterpart, 'East') appears in Gramsci not as a fixed geographical location but as a complex dialectic between centres and peripheries, in which the (absent) place of the West denotes the domain of a robust civil society built up by a hegemonic bloc.<sup>20</sup> Therefore, when considered in light of Gramsci's

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<sup>20</sup> Particularly contesting Perry Anderson's well-known reading of Gramsci (cf. P. Anderson, 1976b), Thomas affirms that "[r]ather than a geopolitical division of the globe into qualitatively different historical times, the *Prison Notebooks* propose the much more difficult task of measuring the interpellation by a 'potential future in the present' of the 'pasts in the present'; that is, the dominance by one particular present social formation of other social formations, a dominant present that threatens to become, at varying degrees of mediation

reflections on the subaltern elsewhere (for example, in the concluding passages of 'Some Aspects on the Southern Question', or in the idea of 'passive revolution' as historical analysis of the *Risorgimento* in Italy), these methodological remarks on the dialectic of domination and subalternity characterizing a 'national' configuration indicate the need to incorporate the 'international' perspective into account.<sup>21</sup>

Despite the well-known animosity of Gramsci towards Trotsky,<sup>22</sup> I find it productive to read Gramsci as participant of the perspective of uneven and combined development. (The perspective itself, of course, has little 'Trotskyist' about it apart from the primeval formulation given by the Russian Marxist.<sup>23</sup>) Furthermore, recent re-elaborations on the categories of unevenness, combination and development can invigorate the historical-materialist attempt to come to terms with question of the temporalities and dynamics of subalternization/resistance identified –among others– by postcolonial reflections. At the same time, such a renewing perspective (since not a theory)<sup>24</sup> might also contribute to undermine the anxious Western-centrism that characterizes both Eurocentric and postcolonial accounts. As Justin Rosenberg (2007: 459) puts it, the notion allows for a "reconstellation and reactivation" of the analysis of the geopolitical dimensions of accumulation with those of capital's "laws", thus making possible the incorporation into analysis of abstract tendencies and concrete outcomes.

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and in more or less pure forms, the future of the others. Against all stageism, Gramsci proposes that it is the historically more 'advanced' centres that allow us to understand the 'delayed' developments in their peripheries. West and East are comparable, just as variations in the West itself, because both participate in the dynamic of an expansive political and economic order that is fundamentally and essentially internationalist in character." (2010: 203).

<sup>21</sup> Actually, Gramsci's conclusion on the out-of-date nature of the strategy of 'permanent revolution' in the West was totally informed by a consideration of the 'modern/colonial' setting: "in the period after 1870, with the colonial expansion of Europe [...]the internal and international organisational relations of the State become more complex and massive, and the Forty-Eightist formula of the 'Permanent Revolution' is expanded and superseded in political science by the formula of 'civil hegemony'." (2003: 243, emphasis added).

<sup>22</sup> However, for a less taxative and more comprehensive account on this animosity, see P. Thomas (2010: 206).

<sup>23</sup> For a seminal reconstruction (from Marx and Engels to Lenin and Trotsky) of the first delineations of the idea of uneven and combined development as imbricated with the strategy of 'permanent revolution', see M. Löwy (1981).

<sup>24</sup> Anievas and Nişancioğlu define uneven and combined development as a "'progressive problem-shift' –within the broader research programme of historical materialism." (2015: 61).

The framework of uneven and combined development implies a rejection of stageist conceptions of historical development, by means of the incorporation of the world-structure of unevenness as a determinate feature of the social. 'Society' is not any longer simply understood as a process within an isolated country: historical capitalism is considered as an uneven and combined world structure. As Alexander Anievas and Kerem Nişancıoğlu stress, the category of unevenness "posits developmental variations both within and between societies, along with the attendant spatial differentiations between them." (2015: 44) It is a conceptual descriptor allowing an account of the non-homogeneous manner of totalization of capitalist development; capital's totalization, that is, is inherently uneven. Conversely, combination "refers to the ways in which the internal relations of any given society are determined by their interactive relations with other developmentally differentiated societies", so that those 'internal' structures (practices, ideologies, institutions) are always a particular crystallisation of historical interactions between "the native and foreign, the 'advanced' and 'backward'" (2015: 48). In turn, Rosenberg says that uneven and combined development has been transformed from a general (e.g. Trotsky's) into a concrete abstraction, in a mutation "from the descriptive factor about human diversity into an active causal structure of determinations and pressures." (2007: 456)

The perspective of uneven and combined development makes it possible to come to terms with the contemporaneousness of the backward and the advanced, the archaic and the modern, that is, of their entanglement in the formation of a concrete, 'national' reality. It proposes a conception of development as a matter of relative comparison, in which the moment of comparability becomes internal to the analysis of discrete historical situations. It is hence compatible with the consideration of modernity as a universalizing structure of temporalization (capital's) whose outcomes are not homogeneous and linearly determined, but uneven, combined and convoluted.

Rosenberg provides, in this respect, an insightful redefinition of 'development' informed by unevenness and combination: "in the novel sense of the [capitalist] unending techno-scientific rationalization of production [development] now becomes, for the first time, a *geographically* universal imperative of human societies, mediated by the *abstract* universal language of exchange-value, within an

*empirically* universalizing social structure: the world market.” (2007: 456) Of course, the imperative of development as the geographically-based demand of capitalism is Western-centred, to the extent that the West continues to signal the normative path of progress and future. The narrative of development is thus the ‘hegemonic’ narrative of capital based on the actuality of its (abstract –but in terms of ‘real abstractions’ –<sup>25</sup> and empirical) universalizing tendencies, tendencies so violent that either annihilate, subsume, or become openly confronted by other-than-capital ways of worlding, worldviews, and temporal densities.

The framework of uneven and combined development provides in my view a stimulating momentum to the theoretical sensibility towards the modern-as-colonial, that is, the Janus-faced global expansion of capitalism in which the temporality of the advanced and the backward, its coevalness and the denial of it, become co-produced and structured. It makes possible to conceive capital’s development as a disparate, heterogeneous, and temporally convoluted process of subsumption and subalternization of ways of worlding and productive relations, of the emergence of different, antagonistic or confronting temporal matrixes derived from the latter, and of the (potential as well as actual) struggles for autonomy unleashed by historical capitalism.

An orthodox Marxism could still claim at this point that the recourse to such subalternist position ends up in de-centring the proletariat as pivotal subject of social revolution. Indeed –if this framework makes sense– the image of a well-defined, by and large subsumed working class as necessarily at the head of socialist struggles becomes just a historical modality of class-formation and class-struggle, opening the terrain to consider other, dramatically more complex processes of proletarianization, semi-proletarianization and des-proletarianization –that is, of the concrete, historical formation of subaltern layers, groups, and classes in which international and local dynamics interweave, giving thus form to a ‘national’ setting. In the temporalization of North and South that the framework of uneven and combined development provides, the *provincialization* of the West –as envisaged by Chakrabarty– can be continued in terms of the provincialization of development as such. This, in turn, demands in my view a further step: to deprovincialize the

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<sup>25</sup> See to this respect D. Sayer (1987). For further elaborations of the idea of real abstraction, see A. Toscano (2008; 2010: 190ff).

conceptual as well as practical, political achievements of liberation and emancipation struggles –be it ‘Western’ or not– against capitalist development, from a standpoint now finally relinquished of ideal-types of class-formation, class-consciousness, and class-struggle.

## 5. Translation and the Task of the Materialist Historian

A deprovincializing horizon for Marxism demands hence a conception of historical capitalism in which modernity and coloniality are markedly co-constitutive, and whereby uneven and combined processes of accumulation, subsumption/subalternization and resistance/antagonism develop in a partially de-centred manner (but nonetheless determined by contradictory tendencies to concentration and centralization (cf. Pradella, 2013), as well as marked by important moments of ‘synchronization’) at global timescale. By these means, we may also avoid the conflation of the concept of capital –and its abstract and abstracting universal tendency, its development as both concrete process and *desideratum*– with that of historical capitalism –the terrain of uneven and combined development in which that and other tendencies are actually performed, confirmed or mutated. In a similar register, Jameson asserts that “what is synchronic is the ‘concept’ of the mode of production, the moment of production is not synchronic in this sense but open to history in a dialectic way.” For this author, conversely, a social formation works as a kind of “metasynchronicity” (2002: 95, 97), the concrete articulation of this open and dialectic process.

Subalternity, in this sense, corresponds to the set of social relations, worldviews and temporalities that remain fragmentary, non-historical from the standpoint of official narratives. However, these temporalities are not ‘different’ in a merely descriptive meaning, or ‘alternative’ as a sort of indeterminate parallel status. They are actually thrown into differentiation and confrontation by the very processes of accumulation, production, and reproduction triggered in the sake of capital. Thus, understood as a set of social relations –and not a fixed condition– the ‘anatomy’ of the subaltern classes is located in concrete historical relations (of resistance and ‘subsumption’, with all the degrees and forms of subordination/antagonism entailed in this dialectic) occurring under capital’s

temporalizing logic. The deprovincialization of Marxism provided by the perspective of uneven and combined development makes possible, in sum, to engage seriously with temporalities other than capital's, that is, with forms of worlding and worldviews partially- or hybridly-subsumed, but which nonetheless are part and participant of the fragmentary histories of the subaltern classes.

To think the dynamics of subsumption and resistance to capital from a subalternist perspective such as that sketched in this chapter implies, in my view, to take seriously the problem of 'translation' posed by Chakrabarty with regard to subaltern temporalities and narratives. Nonetheless, in dissenting with his Heideggerian routes, I argue for a coming to terms with subaltern temporalities and narratives, but not with the recourse (common to postcolonial endeavours) to its epistemologization.<sup>26</sup> Holding onto the tension suggested by Fredric Jameson between 'history' and 'narrative' or 'text' (a tension whereby the former is never utterly reduced to the latter, and nonetheless history is ultimately "inaccessible to us except in textual form"),<sup>27</sup> the return to Gramsci's notion of 'translation' -informed

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<sup>26</sup> Benita Parry addresses these critical points in the Part I of *Postcolonial Studies: A Materialist Critique*. Focusing particularly on Spivak's epistemologization of colonial violence and Bhabha semiotization of the coloniality, Parry recognizes the worth of postcolonial studies while criticizes the idealist agendas implicated and derived from it; see B. Parry (2004, part I. 2 ff). Neil Larsen (2000), in turn, from a similar standpoint considers the postcolonial concept of imperialism (e.g. Edward Said's) as pre-Marxist, that is, pre-economic in the sense of the critique of political economy.

The limits of this research do not afford a balanced criticism on the epistemic idealism through which postcolonial perspectives by and large portray a sort of esoteric deep-time disentangled from capital (modern) time. To contend this sort of idealism, through which capital is reduced to an(other) episteme or epistemological formation, it would suffice to say for now that the recourse to epistemologizing temporalities (which draws in turn upon a rigid separation of epistemology and ontology, separation which arguably corresponds to one of the pillars of the much criticized 'Western metaphysics') runs the risk of re-introducing through the window what has rightly been thrown out the door: namely, the kind of essentialization of (de-materialized) 'cultures', 'languages' or 'worldviews'. In turn, a historical-materialist concept of temporality informed by the critique of capital should overcome the (Kantian?) reduction of time to a dimension of knowledge and understand it rather as a matter of praxis.

I am thankful to Martin Savransky for this and other acute comments and exchanges about the postcolonial canon in general, and in particular the 'Western-metaphysical' gesture of drawing upon the dissection between ontology and epistemology. For a preliminary but very thought-provoking approach to this topic, see Savransky (forthcoming).

<sup>27</sup> I follow Jameson's remarks on the relationship between history and narrative, two concepts that tend to be conflated in poststructuralist (and, I should add, postcolonial) accounts: "History is not in any sense itself a text or master text or master narrative, but that it is inaccessible to us except in textual or narrative form, or in other words, that we

by that of 'subalternity' – may indicate more precisely the method chosen in this research.

In the *Prison Notebooks* (Q 11, §47-48), Gramsci reflects on the possibilities of translation between languages in different registers and levels, for instance, national languages, specialized languages (i.e. science, philosophy, arts), or even 'stages' of civilization. From the standpoint that no language is completely transparent to another (1995: 453–54) –which is to acknowledge the necessity of translation and of translational apparatuses–, he puts the problem as follows:

Translatability presupposes that a given stage of civilisation has a 'basically' identical cultural expression, even if its language is historically different, being determined by the particular tradition of each national culture and each philosophical system, by the prevalence of an intellectual or practical activity etc. Thus it is to be seen whether one can translate between expressions of different stages of civilisation, in so far as each of these stages is a moment of the development of another, one thus mutually integrating the other, or whether a given expression may be translated using the terms of a previous stage which however is more comprehensible than the given language etc. It seems that *one may in fact say that only in the philosophy of praxis is the 'translation' organic and thoroughgoing, whilst from other standpoints is often a simple game of generic 'schematisms'*. (1995: 451, emphasis added)

In this passage, Marxism as such (the 'philosophy of praxis', in the terminology used throughout the *Prison Notebooks*) dwells at the centre of translational endeavours between different temporalities and histories. Commenting on this passage, Fabio Frosini points out that "the concept of *the unity of theory and practice* would be reduced to a procedure of mechanical transposition or to a 'simple game of <generic schematisms>,' if *translatability* did not coincide with it." (2010: 174, original emphasis) The recourse to the image of stages does not undermine Gramsci's powerful insight, for these are understood more as geological layers than as sequential historical 'phases' –that is, they are *coeval* and not linearly sequential.

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approach it only by way of prior textualization or narrative (re)construction." (1979: 42; see also 2002: 20).

Yet Gramsci is also singling out the possibilities for the 'philosophy of praxis' to become a translational field within which diverse subaltern 'grammars' (more on this below) and ways of temporalization might be put into comparative dialogue with 'advanced stages' of a *class struggle* conceived at a world scale.

In this research, translation is conceived as a mediating social practice which involves several dimensions of social life –actually, the very idea of 'dimensions of social life' is a (modern) matter of translation, e.g. everyday life vis-à-vis expert systems and languages. As Naoki Sakai and Jon Solomon put it, the term “names primarily a social relationship whose form permeates linguistic activity as a whole, rather than simply comprising a secondary or exceptional situation.” (2006: 9) The authors identify the dialogical character of this relation in the fact that it “opens up a space of communication and commensurability” in which “the 'positions' themselves are not prior to the translational exchange, but are rather constructed out of it, in posterior fashion, by substituting the spatiality of representation for the temporality of praxis.” (2006: 14) Translation is therefore a social practice that presupposes a trans-cultural, multi-grammatical space of engagements, a space whereby the positions of representational entities, linguistic bodies and communities, are always-already mediated by the temporality of praxis. The latter, in turn, is the praxis through which regimes of translation are structured and re-configured according to grammatical and non-grammatical (economic, political) forces and tensions. Sakai and Solomon (2006: 78) conclude in this regard that translation, rather than as schematic matter of operations, transferences and equivalences, must be seen as assuming a significant role in the constitution of the social as such.

Holding on to Jameson's tension-distinction between history and narrative, I find it suggestive to draw upon Gramsci's use of the notion of 'grammar' in order to think the interlaced relations between language (*la questione della lingua*), national unification, and the translatability from the standpoint of the 'philosophy of praxis'.<sup>28</sup> Peter Ives (2004: 96–97) points out that Gramsci distinguished between

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<sup>28</sup> Trained as a linguist in his youth in the University of Turin, Gramsci devoted several of his reflections to the *questione della lingua*, from a perspective that never ceased to be politically oriented. In particular, his *Quarerni 29*, entitled 'Note per un'introduzione allo studio della grammatica' (Notes for an Introduction to the Study of Grammar), remains arguably a laboratory to be dug into for Marxist engagements with linguistic and translation, related to

'spontaneous' and 'normative' grammars, not with the aim of set out a clear-cut division but rather an analytical gradational axis through which linguistic structures develop in formalization –or in hegemonic orientation– while others remained subordinated. By means of this distinction – Ives and Green comment – Gramsci “is making an argument for a specific method of transforming ‘spontaneous grammar’ into ‘normative grammar’ through a conscious and critical interaction among the existing ‘spontaneous grammars’” (2010: 301). These reflections stand in contradistinction to top-down models of grammatical homogenization, for instance, to the imposition of a determinate normative grammar. But these remarks are also useful to make a critical account of the regimes of translation that have predominated in Marxist debates during the 20<sup>th</sup> century. The problem of translation is thus at the heart of this research, inasmuch as it corresponds to a moment of the adoption of a subalternist perspective as guiding-thread to re-read and reconsider Marxist theoretical elaborations in Latin America.

The perspectives of uneven and combined development, of the hetero-temporality of capitalist modernity, and of the multi-layered grammars of popular struggles facing capital's narratives frame the subalternist hypothesis assumed in this work, which searches for a strategy of reading Marxist theory in Latin America through the lens of the translational regimes established by Marxist authors and currents. As Gramsci grasped it, it is only within the structures of language that women and men orient themselves and make decisions. These structures, conversely, are crisscrossed by international tendencies, both material and intellectual, that circulate throughout the uneven and combined development of capitalism; they are sometimes adopted and reformulated by local groups with dissimilar success, depending on the 'correspondence' to (the adequacy, that is, of the regime of translatability vis-à-vis) the social structure upon which every language and grammatical register is based. In this regard, Derek Boothman offers an enlightening reconstruction of Gramsci's conception of translation, in which the structural level is rendered as the cornerstone of translatability:

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the problems of hegemony and the building of a ethical-moral historical bloc. For an excellent survey on Gramsci's politics of translations, with regard to the translationality between *linguaggio* and *lingua*, see D. Boothman (2010) and F. Frosini (2010); for the relations between Gramsci's treatment of grammar, translation and language in view of the task of the 'philosophy of praxis', see especially A. Carlucci (2013), P. Ives (2004) and P. Thomas (2010, ch. 9 and Conclusion).

Gramsci regards translation as an act in which, from the propositions expressed in natural language 1, one descends through the appropriate levels of the superstructure to the 'base' or 'structure' of a society that has or has in the past had a 'fundamentally similar' structure, in order then to carry out the reverse, ascending, procedure to arrive at the 'surface' constituted by natural language 2. (2010: 123–24)

Conversely, the comparability and translatability between 'discourse' (*linguaggio*) and 'natural' language (*lingua*),<sup>29</sup> two grammatical levels entailing different regimes of diffusion and translation, provides a pathway through which the historical development of Marxism and analyses can be re-evaluated from the perspective of different grammars and linguistic levels intertwined in the translational 'temporality of praxis' in which Marxist theory aims to participate. The distinction between grammars and grammatical levels, therefore, is part of the tasks of the materialist historian or 'organic intellectual', in so far as it relates to the questions of hegemony, and crucially of the becoming-hegemonic of the subalterns on the basis of their 'spontaneous grammars'. Commenting in the *Prison Notebooks* (Q 29 §3) on the usefulness of language and linguistic debates in consideration to political issues, Gramsci asserted that

[i]t is not correct to say that these discussions were useless [...]. Every time the question of language surfaces, in one way or another, it means that a series of other problems are coming to the fore: the formation and enlargement of the governing class, the need to establish more intimate and secure relationships between the governing groups and the national-popular mass, in other words to reorganise cultural hegemony. (1985: 183–84).

To put translation among the tasks of the materialist historian summarizes my understanding on the necessity to 'deprovincialize' the Marxist conceptual

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<sup>29</sup> The rendering of discourse and natural language as *linguaggio* and *lingua* respectively is provided by Fabio Frosini. Frosini asserts on this point that "[t]he relationship between scientific and philosophical languages [*linguaggi*], which the Pragmatist recognized, is nothing but a particular manifestation of the problem of a national linguistic unity. This problem can be dealt with correctly only if actively formulated in terms of linguistic "unification." Yet, given the equivalence of language [*lingua*] and ideology, this relationship is correctly posited only if it is thought of as an active process of *ideological* unification" (2010: 178, original emphasis).

apparatus in the wave of its current critical conjuncture, significantly marked in the Global South by the burdens of official Marxism as development, modernization ideology. In my view, this makes possible, on the one hand, to consider the exercise of conceptualization as a question of 'translation' from the multilayered and fragmentary grammars of subaltern classes into the language of class struggle –the politically-oriented and presently-informed language of Marxism. As with any translation, there is no guarantee of succeeding in the attempt. Yet, in any event, what must be prevented is the illegitimate hegemony of “unilateral regimes of translation” (Solomon and Sakai, 2006: 2) – an instance of which was the national-industrial working class as archetype of the proletariat. On the other hand, the incorporation of translation projects the Marxist realm as an uneven and combined space of engagements, debates and criticism, striving in variegated ways to actualize the transformative moment of theory. In other words, what the translational dimension enables us to envisage is Marxism as a trans-cultural<sup>30</sup> or multi-grammatical field of encounters and mismatches, of commitments and polemics, in which the regime of (non-unilateral) translation regulates the heterogeneity of grammars and historical practices. A self-critical realm in the strongest sense of the term, to be sure.

If Jameson is correct in indicating that the “master code” of Marxism’s interpretive framework or language (i.e., discourse) is the notion of ‘mode of production’ –a synchronic category, as we already saw–,<sup>31</sup> then from its mobilization, destabilizations, and reconstructions we can trace the contours of these strategies of translations that, while subalternized by official Marxism, found nonetheless the manner to engage seriously with other modes of production, reproduction and temporalizations. In turn, Barry Hindess indicates a pathway to

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<sup>30</sup> I am once again in debt to John Kraniuskas by the rescue and revalorization of the concept ‘transculturation’, a term that, as he puts it (quoting Angel Rama in doing so), “describes a Latin American perspective’ on the experience conventionally referred to as acculturation” (2000: 114), and hence allows a non-unilateral, more plural perspective for ‘post-colonial’ dynamics.

<sup>31</sup> Cf. Jameson ([1981] 2002). As Dominick LaCapra synthesizes it, Jameson’s perspective (as offered in *The Political Unconscious* and which I will follow in its general lines in this research) “contribute[s] to the rebirth of a genuinely political discourse in the study of culture and history. [...] For it is Marxism that provides the political master code for the allegorical reading and ‘rewriting’ of all cultural history, and it simultaneously reveals the coded truth of earlier allegorical modes. Only Marxism can decode the past in its utter ‘otherness’ and in its bearing of the needs of the present.” (1983: 237).

come to terms with 'theory' as object of inquiry for the materialist historian. He refers to "the moment of theory" as a composite structured by the temporally uneven development of its parts (2007: 21). In other words, the components of a theoretical moment are also uneven, non-contemporaneous, and nonetheless in some instances work in a combined manner. Therefore, the consideration of those instances or events giving momentum to theoretical achievements within Marxist theory (that is, within the politically-oriented language of class struggle based on the mode of production as master code) should take seriously into account the uneven and combined temporality of its parts.

## 6. Towards 'Latin American Marxism'

The framework of uneven and combined development, informed by considerations of the hetero-temporal nature of historical capitalism as well as of translation and trans-culturation, are indeed part of the strategy of critical reading chosen for coming to terms with the intellectual constellation I call Latin American Marxism. However, this choice corresponds to the family of themes found in the authors and currents considered throughout this work. In other words, what might be read as the superimposition upon the selected authors of a pre-determined theoretical framework, is rather the evidence of a theoretical sensibility which exudes from these formulations and the questions that they channel – what I have chosen to term 'subalternist hypothesis'. By means of making visible this hypothesis, I think Marxism can reinitiate the critical dialogue with other perspectives (tangentially or directly) critical towards capital, capitalism and its narratives. In particular, the revision of local or regional constellations of thought made up under the name of Marxism (in other words, constellations that took up Marxism as their 'language') might contribute in my view to re-read significant conceptual developments somehow subterranean vis-à-vis official versions of Marxism, in the horizon of its deprovincialization – which, in my turn, I understand as a decolonizing horizon as well.

Nonetheless, the recourse to the subalternist hypothesis based on the notion of intellectual constellation, while stimulating the clarification of the set of themes and approaches brought together in this research, is also oriented to make explicit the

differences and contradictions among the authors and currents evaluated here. Intellectual constellation, in this sense, is aimed to offer a non-reductive bringing together of a common sensibility toward themes and concepts disregarded by official Marxism in Latin America and elsewhere. It is, in other words, a cohesive but not unified or conflating assemblage that in turn shows, and attempts to explain, the differences through which this common sensibility has been actualized in the making of Marxist theory in the region.

In the following chapters, my research provides a reconstruction of the subalternist hypothesis in Latin America by means of surveys of authors and currents somehow subterranean to the official versions of Marxism. Although some of them were directly committed to official Communist policies of the period, the intellectual autonomy achieved in those cases is an important dimension for delineating a deprovincialized Marxism. By means of this reconstruction, I think it is possible to put into dialogue putatively metropolitan and peripheral versions of Marxist theory; conversely, it is also possible to critically evaluate the regimes of translation adopted as well as resisted during this period, with the aim to come to terms with the (uneven and combined) development of actually-existing capitalism. In doing so, finally, the rather 'underdeveloped' goal of this research is to provide some materials and reflections so as to contribute to the cartography of the uneven and combined development of Marxist theory.

## II. Uneven and Combined Development in Mariátegui's 'National' Marxism

'The time has passed for ever when the cause of democracy and socialism was directly tied to Europe'.

Vladimir Lenin, Address to the  
First Congress of the Third  
International, 1919.

'We certainly do not want socialism in Latin America to be a copy or imitation. It should be a heroic creation. We have to give birth to Indo American socialism with our own reality, in our own language.'

José Carlos Mariátegui, *Revista Amauta's* 17th editorial, 1928

### 1. Some Notes on the Inception of Marxism in Latin America

One of the theses to be problematized through this work corresponds to Aricó's (1999: 13) argument of the tributary character of the Marxist theory produced in this region. Tributary here means a non-original and hence derivative relation between the concept and his object. If the Marxist conceptual apparatus was since its very beginning elaborated regarding the most advanced capitalist regions of the world, the nature of its gaze towards Latin America must of necessity project a backward, non -scientific reality. The lack of interest displayed by original or classical Marxism regarding Latin America, in these terms, is read as the evidence that the value that Marxist theory might hold was placed in a future still to be accomplished. In other words, for Aricó the partial inadequacy between theory and reality worked thus as reinforcement of the evolutionist conception which was apparent in many (if not the majority) of Marx's epigones.

In the period between the Paris Commune and the First World War, Marx and Engels were just part of a myriad of authors that populated the shelves of Latin American reformists and revolutionaries. Together with them, there were the names of Bakunin and Blanqui, Ferri and Lassalle, Proudhon and Tolstoi, in a list that not infrequently included intellectuals such as Spencer or Loria. Raúl Fornet-Betancourt (2001, ch. 1 and 2) identifies in this process a preparatory or "blurred" (*confusa*)

diffusion of Marxism in Latin America, a period of inception that will be followed by a time in which the elaboration of the canonical Marxist textual corpus (the task undertaken by Engels, Plekhanov, Kautsky, Labriola, Bernstein, and Guesde among others) operated in the demarcation of socialism from both anarchism and liberalism as ideological-political fields. Fornet-Betancourt calls this second period the moment of the “conflict among socialisms”, in which in particular the spontaneous apolitical nature of the subaltern classes was taken up by anarchism and, conversely, the Marxism of the Second International appeared as the ideological expression of urban workers and European migrants.

In the midst of this process, the debate on the theory’s scientific character was increasingly populated. However, as Jaime Massardo has correctly indicated, a mistranslation played a role in such a debate. Engels’ *Socialism: from Utopia to Science* was no doubt a crucial landmark in the proclamation of Marxism as science of history, albeit two precisions are in order here. First, the meaning of the German *wissenschaft* is indeed quite different from both the French *science* and the Spanish *ciencia*, the former having a wider meaning. As Georges Labica argues in the voice ‘Science’ of the *Dictionnaire critique du marxisme*, “*Wissenschaft* is broader than *science* (inheritor of the Greek *epistêmê*). It does not only connote knowledge systems, or the disciplinary repertoire of the kind of mathematics, physics or biology, or even the human sciences; it equally covers the meaning of know [*savoir*], of knowledge taken generally, of teaching method...” (Labica and Bensussan, 1985: 1030, my translation) But the German term traversed the Atlantic only after having been adopted as *ciencia* through the influence that German Social-Democracy (socialism’s ‘guide party’, in Engels’ famous assertion) instilled, first, over its French counterpart, and then over the Spanish Socialist Party.<sup>32</sup> The result of this mistranslation in Latin America was, as Massardo points out, a conception of socialism based on a fetishistic idea of its scientific nature (2001: 30), for which science appeared as both the a priori for historical inquiries and the political outcome of human development.

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<sup>32</sup> Outlining this transit from Social-Democracy to Guesdisme to Madrid’s *El Socialista* to Buenos Aires, Massardo observes that “issues so important as the peasant question and the specificity of cultural forms which, conversely, constitute the essence of the political, remained outside the Spanish codes through which Madrid socialist represented society.” (2001: 17).

The struggle for ideological demarcations that characterized the process of conformation of workers' incipient organizations was a component of the growing presence and circulation of socialist literature in Latin America. Marx and Engels were thus participants within this cultural fabric in Latin America, albeit at the outset in a rather subordinated position. Certainly crucial for the increasing prominence of Marxism was the publication of the first complete translation of *Capital* into Spanish, made by Argentinean Juan Bautista Justo (1865-1928) between 1897 and 1899. Justo can be seen as representing the epochal synthesis of a markedly eclectic Marxism and an undisguised evolutionism. In Aricó's view, he constituted "the first attempt in thought and action to establish a politically productive relationship between [Marxist] theory and social movement" (1999: 15). The significance of Justo in the early history of Latin American Marxism is parallel to the importance of the Argentinean Socialist Party (PSA), the first of its kind founded in the sub-continent in 1896. Among other reasons, this party held a marked influence upon other similar organizations because it exhibited a solid and well-recognized leading group, counting some important intellectuals such as José Ingenieros and Leopoldo Lugones among them. This group also created the paper *La Vanguardia*, of enormous impact in the diffusion of Marxist debates in Argentina and Latin America (cf. Tarcus, 2007, ch. X), for which Justo himself translated articles from other European journals such as *Die Neue Zeit*.

Regarding Justo's intellectual underpinnings, Marx and Engels appear as part of an open, progressing debate leading to a scientific, positive knowledge of capitalist society. Indeed, for him positive reality worked as the verification instance for scientific knowledge. He shared with Engels and Bernstein a marked dismissal of the philosophical dimension of Marxism, prioritizing instead its scientific valence. In this regard, Justo understood scientific socialism as the refutation of speculative philosophy, in what Aricó considers as the foundation of the tradition of 'positivistic socialism' in Latin America. (1999: 37) This amounted to a notion of "naïve realism" (*realismo ingenuo*) placed at the heart of his conception of socialism: "[since] popular and scientific movement, in order to be genuine socialism must be naïve; to be conscious, it has to be vulgar" (cited in Tarcus, 2007: 382; cf. Justo, 1914). This is also expressed in Justo's reduction of the dialectical method to the notion of evolution: "[t]he idea of evolution seems to be the substantial part of dialectics"

(cited in Tarcus, 2007: 381). What Jorge Dotti (1990) renders as Justo's naturalist conception of history – based on the ideas of evolution and progress – was therefore the framework of a perspective in which capitalism and socialism were placed in a linear and ascendant continuity; socialism appears in this view as the highest degree of a rational organization of society (cf. Aricó, 1999: 44).

This conception was at the centre of both Justo's reading of *Capital* and the PSA's political definitions. He believed that “democracy and science are the two greatest revolutionary factors of present times” (cited in Tarcus, 2007: 380). Consequently, the socialist party must work on both political and the scientific terrains. In what Aricó reads as a perspective in which the economic dominion over nature is translated into politics in a non-mediated way –hence exhibiting a significant contempt for the concrete forms through which the incorporation of popular masses to politics takes place– the socialist party held for Justo the role of engine for the political modernization of the country (Aricó, 1999: 63, 85; see also Tarcus, 2007: 395). Situated in a conjuncture where economic modernization was accompanied by political ‘backwardness’ and cultural ‘traditionalism’, Justo understood the task of the PSA as the promotion of science within the political, the building of a democratic institutional framework based on rational, modern pillars mirroring European states, and oriented to reinforcing the evolution from capitalism to socialism.

Largely derived from the hegemonic perspectives within the Second International, Justo's conception of socialism was severely put into question during the twentieth century's second decade. On the one hand, the outburst of the First World War provoked a schism famously termed by Lenin as the ‘bankruptcy’ of the foundations that working-class politics had been built upon, the thorough collapse of the terrain hitherto grounding the socialist movement (cf. Kouvelakis, 2007: 165). On the other, the events of the Mexican revolution (1910-1918) questioned the generalized belief of peasant masses as incapable of waging their own liberation struggle, hence opening a question about the particular infrastructures upon which Latin America's class struggle finds place. As Lenin put it in his 1919 address to the First Congress of the Third International, “the time has passed for ever when the cause of democracy and socialism was directly tied to Europe” (cited in Kouvelakis, 2007: 167) Mariátegui also considered that only with the emergence of the new, truly

international communist movement –that is, with the Third International- did Marxism become equipped so as to translate the analytical categories of Marx into non-European realities.

## 2. Mariátegui and ‘Leninism’

In his contribution to Norberto Bobbio’s *Dictionary of Politics*, Aricó (1983: 950) placed Mariátegui as the foremost expression of the “Leninian intuition” (*intuición leniniana*) in Latin America. ‘Leninian’ seems to be used here by Aricó in order to avoid the overcodified (and misleading) term ‘Leninist’. Some years before, in his already classic ‘Introduction’ to the Peruvian Marxist, he argued that Lenin worked in Mariátegui less as a fixed set of principles and more as a “catalyst” of themes and methods, observing immediately that “the problem still remains open of which Lenin, and to what extent [...]” (Aricó, 1980: xxiii). In this reference to the ‘Leninian intuition’, Aricó recalled Lenin’s identification of the relative autonomy of colonial situations in the imperialist conjuncture, and the concomitant need to de-centring Marxist theory from its Eurocentric bents. In other words, Lenin opened up the possibility to think the particularities of non-European societies from a Marxist perspective. But this sentence might also be considered from the perspective of the primacy of the political over the economic, on the one hand, and of the concrete analysis of current situations, on the other –in what György Lukàcs (1972) summarized as the orientation towards the ‘actuality of the revolution’. Let us look into these two aspects in more detail.

### *Imperialism, Colonialism, and the Global South*

Sanjay Seth has argued that Lenin opened up of a conceptual space for the colonial world within Marxist reflections (Seth, 1995; cf. also Young, 2001). By means of his characterization of imperialism, as well as his insistence on the right of peoples to self-determination, Marxist theory encompassed a broader geographical scope for revolutionary struggles, well beyond ‘advanced’ Europe. The agreement with this perspective is apparent in the first works of Mariátegui after his return to Peru in 1923, i.e. the articles of *La escena contemporánea* (‘The Contemporary Scene’, of

1925)<sup>33</sup>, and the set of talks given at Lima's Popular University González Prada (UPGP, in its Spanish acronym) under the heading of 'History of the World Crisis'.<sup>34</sup> These texts focus on related topics: the crisis of liberal democracy; the social and political implications of the war; the revolutionary tide opened by such crisis, expressed in the polarization between revolution and reaction; the division of the proletarian realm between reformist socialism and communists or 'maximalists'; the emergence of colonial and semi-colonial, non-Western popular struggles on the world stage; and the evaluation of intellectual, artistic and philosophical attitudes towards the world crisis.

The revolutionary emergence of the so-called 'Oriental' world is a special section of *The Contemporary Scene*. But before, in the eleventh conference at the UPGP, Mariátegui explained to the audience that solutions to the post-war situation have attempted to build 'national pacts', within which both bourgeoisie and proletariat should relinquish to certain demands so as to bring the economy back to an allegedly 'normal' level. These pacts or 'civil truces' are concomitant –he continues– with the purpose of further systematizing the exploitation of colonial and semi-colonial countries, so that the internal economic adjustments required by central powers would not prove too aggressive toward European workers. This is the argument about social-imperialism addressed by Hobson ([1902] 1988) and Lenin ([1916] 1996), and recast for instance by W.E.B Du Bois from an African-American standpoint ([1905] 1970). They all insisted on the coupling between imperialism and race prejudices, or the entanglement of economic neo-colonization, territorial annexation and the 'colour line', thus enabling a consideration of the new imperialist forces in terms of an economic-cum-racial phenomenon.<sup>35</sup> In turn, Mariátegui asserts that "European capitalism tries to suffocate Europe's social revolution with the distribution among European workers of the utilities obtained

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<sup>33</sup> The articles compressed in *The Contemporary Scene* were written between 1923 and 1925; most of them appeared in the Lima magazine *Varietades* before to comprise the book, which was launched by Editorial Minerva, later Editorial Amauta and founded by Mariátegui and his brother Julio César in 1925.

<sup>34</sup> The 17 lectures (given between June of 1923 and January of 1924) are compiled in the Vol. 8 of the Complete Works, *Historia de la Crisis Mundial*.

<sup>35</sup> Alberto Toscano summarizes the argument about social imperialism shared by Hobson, Lenin, and Du Bois as the process which "drives a capital unable to super-exploit its 'own' working classes beyond its national borders, and pushes the state to promise or offer then a rising share of imperialist spoils." (2015: 241).

from the exploitation of the colonial workers. Thus the 300 million inhabitants of Western Europe and United States enslave to those 1500 million inhabitants of the rest of the earth" (1984: 141). In this sense, imperialism comes to the fore as just one side of the Janus-faced internationalism: "[i]n reality, capitalism could not stop being internationalist because capitalism is, by nature and necessity, imperialist" (1984: 161).

*The Contemporary Scene* describes Marx's genius through the exposition of "the contradiction between the political form and the economic form of capitalist society", which affords the prediction of "its ineluctable and fatal decadence" (1965a: 171). The contradictions between formal freedom and actual exploitation, socialization of production and private ownership of wealth, are instances of such a general contradiction. And the current expression of the capitalist crisis –as defined in the conference devoted to internationalism and nationalism– is precisely of that nature: "the contradiction of the politics of capitalist society with the economy of capitalist society. In contemporary society, politics and economy have ceased to coincide, to agree. The politics of contemporary society is nationalist; its economy is internationalist. The bourgeois State is built on a national basis; bourgeois economy needs to rest on an international basis" (1984: 161–62). The contradiction between productive forces and relations of production, as the two terms of a mode of production's contradiction, are linked by Mariátegui (by means of Lenin) to a further global perspective. Conversely, this newer element transforms the contents and forms of its components: nationalism, in this conjuncture, mutates from a conservative to a potentially revolutionary catalyst. As Mariátegui put it elsewhere: "the ethical function of the socialist idea is transformed in political or economic colonial peoples. In these peoples, by force of circumstances, without absolutely denying any of its principles, socialism acquires a nationalist attitude" (1986: 100–01).

The first period of Mariátegui's intellectual work was concerned with the international scene and the introduction of its comprehensive elements in Peru. By pointing out the prominence of imperialism and the new conditions that it brings to class struggles at the Global South, the perspective thus adopted was able to incorporate the racial division as a factor of the new capitalist stage. In both the conferences and the book, Mariátegui gives a broad picture of the international

scene, whose main drama was being played out in post-war Europe but which extended its scope to all the zones of the world under imperialist rule.

I argue that Mariátegui's 'Leninism' can be understood in terms of two interwoven elements. On the one hand, there is 'imperialism' in its fullness as the dialectical category of totality in capitalism's latest stage. In other words, through Lenin's conception of imperialism as the globalization of capital accumulation under monopoly capital, Marxism comes to terms with a higher organization of the contradiction between productive forces and relations of production encompassing the whole planet, albeit in uneven and clashing manners and rhythms. This category incorporates the non-Western parts of the world to the scene of the crisis. This conceptual achievement allows Marxism to understand the seemingly paradoxical proximity of events coming from non-Western realities far away from one another such as the Peruvian indigenous movements and 'oriental' struggles for decolonization. On the other hand, there is the primacy of the concrete analysis of concrete situations, that is, the necessity to re-conceptualize categories and strategies of approach in view of the present-day conditions of the class struggle. The primacy of concrete analysis is what Gramsci understood as the main lesson of the late Lenin: to 'nationalize' (to translate, that is) the revolutionary experience of the Russian Bolsheviks.

#### *The Actuality of Revolution*

Mariátegui's 'Leninist' reading of both Marx and the contemporary crisis is explicit in an article published in March 1924 by *Claridad's* 5<sup>th</sup> issue, written as tribute to the recently deceased Russian leader and entitled simply 'Lenin'. The article describes his legacy in the following terms:

[Lenin] has defined the historical meaning of contemporary crisis, has discovered a truly proletarian and classist method and praxis, and has forged the moral and material instruments of Revolution. (1975: 39)

As Lukàcs explained, despite the fact that his booklet *Imperialism: the highest stage of capitalism* did not really contain new elements when compared, for instance, to its predecessors (such as Hobson, Hilferding, Luxemburg, and also Bukharin), Lenin's

account of imperialism is superior to all these works in its “concrete articulation of the economic theory of imperialism with every political problem of the present epoch, thereby making the economics of the new phase a guide-line for all concrete action in the resultant decisive conjuncture.” (1972: 41) Imperialism – Lukàcs goes on – has built up a truly world economy, in a process in which “for the first time in history the nations oppressed and exploited by capitalism no longer fight isolated wars against their oppressors but are swept up as a whole into the maelstrom of the world war.” (1972: 44) As a consequence, the national struggles of the so-called colonial and semi-colonial regions of the world are no longer struggles against merely local feudal classes, but rather “they are forced into the context of imperialist rivalry between the world powers”. (1972: 46)

Understood as the dialectical category of totality in the highest stage of capitalism, imperialism shifts the perspective of revolution from the national to the international setting; in so doing, the problem of the ‘maturity’ or ‘ripeness’ of revolutionary conditions is no longer totally defined by national boundaries. However, in keeping with Gramsci’s acute reading Lenin’s ‘philosophy of praxis’, this question of nationalism and imperialism is also dialectical:

The international situation should be considered in its national aspect [...] the ‘national’ relation is the result of an ‘original’, unique (in a certain sense) combination, which needs to be understood and conceived in this originality and uniqueness [...] the line of development is towards internationalism, but the point of departure is ‘national’. It is from this point of departure that one must begin. Yet the perspective is international and cannot be otherwise. (2003: 240)

Mariátegui’s classist starting point understands the consequences of this dialectic in terms similar to Gramsci, who pointed out that “*the leading class is in fact only such if it accurately interprets this combination, of which is itself a component and precisely as such is able to give the movement a certain direction[...]*” (Ibid. emphasis added) From this perspective, imperialism becomes a world-system irreducible to its national parts; however, the highest stage of capitalism provides an unprecedented political ‘autonomy’ to the colonial and post-colonial world, something needed to be taken into account for a revolutionary strategy, As it was argued in Chapter I, the

clarification of the dialectic between the international and the national determines the concrete dynamics of domination and subalternization occurring locally; and the framework of uneven and combined development allows a conceptual space for a rejection of stageist conceptions of capitalist development, given the focus of the coevalness of non-contemporaries. In my view, it is Mariátegui's insistence on the interweaving of international and national forces that oriented his method in a direction that would later bring to the forefront the potential synchronicity of modern socialism and the indigenous communities, as we will see in what follows.

The most canonical periodizations of Mariátegui's work place the moment of the 'nationalization' of his thought by early 1925, with the publication of the article 'Peru's Principal Problem'. Jorge Falcón famously declared this article to be the 'first word' of *Seven Interpretive Essays* (1978; see also Terán, 1985; 1986, ch. 6) insofar as it places the indigenous question at the centre of Mariátegui's characterization of the particular conditions of class struggle in Peru. I contend here that such an idea of nationalization needs to be clarified, since the 'finding' of this principal problem demanded for Mariátegui an extended consideration of the dialectic between the international and national dimensions of social reality, far from the one-directional 'application' of abstract conceptions. As he put it elsewhere: "the ethical function of the socialist idea is transformed in political or economic colonial peoples. In these peoples, socialism acquires by force of circumstances, without absolutely denying any of its principles, a nationalist attitude". (1986: 100–01) The socialism which emerges in the imperialist conjuncture from the Global South carries out the distinction between internationalism and nationalism out to a higher synthesis. Such a synthesis is signalled by the 'colour line' as a concrete, worldwide political and ideological feature in the division of populations for monopoly capital's sake.

The 'Leninian intuition' highlighted by Aricó can thus be read as the necessity for Marxism to re-characterize the North-South division, thus signalling a pathway to overcome the Eurocentrism that, however unwitting, characterized Marxism before the Russian Revolution. Remembering the fact that Mariátegui's *Seven Interpretive Essays* is contemporaneous to Gramsci's 'The Southern Question', Harry Harootunian (2015, ch. 3) argues that the idea of 'South' functions less as a geographical location captured into backwardness, and more as a particular

temporal register. And this interweaving of temporalities is what Mariátegui understood to be at the core of Peru's primary problem.

### 3. Peru's Primary Problem

The country that received Mariátegui when he returned to Lima in March 1923, after three and a half years of exile in Europe, was slightly different from the one he had left behind. Augusto B. Leguía had ruled Peru since 1919 in a term that will be known as the *oncenio*, that is, eleven years in office. During the *oncenio*, an initial 'honeymoon' between his government and popular sectors had mutated by 1922 into a more explicitly authoritarian and repressive attitude. Indeed, important sectors of the working class had initially adhered to his promises of true democracy and economic development; the students had even proclaimed him as the 'Master (*maestro*) of the youth'; and in his first year in office the Patronage of the Indigenous Race (*Patronato de la Raza Indígena*) was created as a means to incorporate indigenous issues into his administration –if in a merely corporatist fashion (cf. Cotler, 1988: 188).

Leguía's *oncenio* is considered by historians such as Julio Cotler or Alberto Flores Galindo and Manuel Burga as the end of the 'aristocratic republic', an expression of the oligarchic pact characteristic of many nineteenth-century countries in Latin America. This moment witnessed the manifest breakdown of the unity that dominant groups had achieved during the previous thirty years. They argue that during the 1920s a deep reorganization of Peru's productive structure began by means of the intensification of transference of capital from US, a concomitant increase in proletarianization, and an important countryside-to-city migration. Cotler (1988: 193ff) situates here the outset of 'modern Peru', when a fraction of the local bourgeoisie, eager to directly negotiate with imperialist capital, took control of the state apparatus through an active centralist policy, largely based on international loans.<sup>36</sup> The author concludes that "the state became the thorough and refined expression of the exporter bourgeoisie" (1988: 186). On the other hand,

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<sup>36</sup> Flores Galindo and Burga (1980: 230) add that, during this term, the Peruvian public debt increased by 1000 per cent, an amount that Cotler (1988: 196) reckons to approximately 100 million dollars; conversely, the interest of the external debt increased from 2,6 to 21 per cent of the national budget between 1920 and 1930.

either by cooptation or open repression, the organized proletariat had lost by 1923 the political initiative displayed during the popular strikes of the biennium 1918-1919. From those mass-demonstrations demanding the eight-hour working day and the lowering of the prices of subsistence goods, the Peruvian working class suffered an ebb to more rearguard positions.

In this context, the students were perhaps the most active social force, particularly with the creation of the UPGP in 1920, in the wave of the University Reform movement. The University Reform – whose initial outburst took place in Córdoba in 1918 – was a continental movement for democratization of academic institutions, at that time a meeting point for a young generation of intellectuals committed to politics in a new fashion. As a movement largely based on new middle classes arising from within the modernization processes, these social actors suffered unprecedented forms of precariousness and marginalization that contributed to their engagement with public, political activities in a newer fashion (cf. Rama, 1996, ch. 4 and 5). In the discourse of the 1921 First International Conference of Students in Mexico City, Gabriel del Mazo (the leader of the reformist movement in Argentina) affirmed that “it is mandatory for students to establish popular universities, freed of any dogmatic and partisan spirit and that take part in the workers’ struggles, inspiring their actions in the modern postulates of social justice...”(cited in Melgar Bao, 1999: 44) In Peru, and despite the fact that these organizations were – to a certain extent and at the outset – sponsored by Leguía himself, they soon became the place where the opposition to his government started to ferment. The head of the Peruvian universities at the time was Víctor Raúl Haya de la Torre (1895-1979).

Soon after his return to Peru, Mariátegui started to collaborate with Haya de la Torre, first in the UPGP’s talks and then taking charge of the journal *Claridad* – the organ of the Peruvian Student Union – after Haya’s exile in 1923.<sup>37</sup> The increasing state repression eventually led to the closing down of the journal, while the UPGP went on working but in a semi-clandestine guise. In parallel, a stronger alliance

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<sup>37</sup> One of the linchpins of the so-called ‘new generation’ in Latin America was the proliferation of magazines named *Claridad* (thereby emulating Henri Barbusse’s *Clarté*) and the foundation of popular universities (*universidades populares*) in countries such as Cuba, México, Puerto Rico, Guatemala, Panamá, Perú, Chile and Argentina. For an account of the impact of the University reform during the 1920s in Latin America, see Patricia Funes (2006).

between the activists exiled by Leguía and those who stayed in the country began to forge a project in which Latin American revolution was placed at the centre of Peru's politics. The confluence between the clarification of the country's primary problem and the continuity of Latin America's situation in the world setting gave life to the American Popular-Revolutionary Alliance, APRA. The conformation of this organization was made public in 1925 by Peruvian exiles in Mexico led by Haya, with the active participation of Mariátegui and other Peru-based militants.<sup>38</sup>

#### *The United Front and the APRA Project*

The tactic of the united front was proclaimed by the Third International from 1921 and corroborated in its 1924 Fourth Congress. In May 1924, Mariátegui wrote the short article 'May Day and the United Front', saluting the working class on its day, and giving a synthetic formulation of the matter: "[b]efore the perhaps inevitable hour of division, it is up to us to complete much common work, much shared labour" (2011: 342). The main aim of such a common labour – to provide the Peruvian proletariat a more definite class consciousness – is decomposed by Mariátegui into three general orientations: to distance the working class from 'yellow assemblies', to fight against reaction, and to defend the organs of 'popular culture' (i.e. proletariat organizations and press). Mariátegui immediately adds a more concrete one: "[w]e all have the obligation of sustaining the vindications of the enslaved and oppressed Indigenous race" (Ibid.). These are the elementary historical tasks to be embraced by the Peruvian vanguard in the actual stage of its formation; elementary means here basic and thus prior to any ideological or doctrinaire consideration:

The united front [...] is a contingent, concrete, practical action. *The program of the united front only considers the immediate reality, outside of any abstraction and of any utopia. Recommending the united front is not, then, recommending any ideological confusion. Inside the united front everyone should keep his own affiliation and his own ideology.* (Ibid., emphasis added)

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<sup>38</sup> For an account on the significance of the exile in the formation of APRA, see Martín Bergel (2009); see also Ricardo Melgar Bao (2003).

Insisting on the 'concrete' character of the united front, Mariátegui argues that: "[t]o form a united front is to have an attitude of *solidarity before a concrete problem*, before an urgent necessity. [...] What is important is that these groups and tendencies know how to understand each other before the concrete reality of the day". (2011: 343) This emphasis on the concrete might be read as the dialectical unity of international and national class solidarity and consciousness. Mariátegui enumerates some abstract, very general instances –class solidarity and consciousness, defence of workers' organizations, joint fight against reaction– and then introduces what he himself will call some months later Peru's principal problem: the enslaved and oppressed Indigenous race as the country's central conflict.

Therefore, Mariátegui understood that without the international perspective the Peruvian working class remains blind to its own conditions of possibilities to actually and effectively participate in the world revolution; conversely, without an attentive and active commitment to the most urgent problems of its own national reality and its subaltern subjects, it remains groundless and thus lacking 'hegemonic' ability, to put it with Gramsci. Hence, in the context of the uneven and combined development of a capitalist system driven by imperialist forces, the tactic of the united front has to be situated in the socio-racial oppression of Peru's and other Latin American indigenous populations. Indigeneity becomes thus the locus of an emergent revolutionary politics which needs in turn be nationalized, grounded in a concrete terrain under the guidance of anti-imperialist socialism. National hegemony, in this sense, functions as the action that synchronizes two different but coeval temporalities: the archaic Indian and the modern proletariat.

This understanding of the dialectics of the cosmopolitan and the autochthonous is apparent in the history of what was perhaps Mariátegui's most ambitious project. As recounted by Fernanda Beigel (2006: 181ff) and Jorge Coronado (2009: 26–9), the initial name given to his much-dreamed journal was *Vanguardia*. However, by the suggestion of *indigenista* painter José Sabogal (who would eventually paint its most iconic cover-pages), it was called *Amauta*, a Quechua word which means teacher, poet, or wise person –but also the one who transmits a certain worldview, the *translator*. The choice of this name demanded an explanation which was provided in its first editorial sheet: "This title translated our

affiliation to the Race, it reflects our homage to Inkaism. But with this journal the word *Amauta* acquires a new meaning. We are going to create it anew. [...] we will always consider Peru within the world scenario." (Mariátegui, 1987: 239) In consequence, from its very name the journal presents itself as a translational endeavour which advocates for the encounter of modern revolutionary classes with indigenous traditions –in other words, a translation through a recreated tradition.

Such a recreation, conversely, will depend on building a new collective subject – a vanguard – through what Mariátegui foresaw as a process of “polarization and concentration”. This process – arguably the projected consolidation of the united front as such – will partially take place in *Amauta* itself, at least in its more abstract issues:

The work of the journal will set us in solidarity further. At time it will attract other good elements, it will dispel some of the floating and apathetic who now flirt with the vanguard [...] *Amauta* will winnow the vanguard’s men – militants and sympathizers – until it separates the wheat from the chaff. It will produce or precipitate a phenomenon of polarization and concentration. (Ibid.)

The images used by Mariátegui in this passage project forth a kind of chemical force-field where, in the process of presenting definitions and their attendant polemics, some elements are attracted (concentrated) while others are dispelled (polarized). To be sure, the multi-faceted character of *Amauta* contributed to this action-and-reaction process. Among the recurrent themes of the magazine, it is worth mentioning: educational issues, in particular regarding to the aftermaths and continuing significance of University reform; the nature and function of artistic production; the national question in Latin America, related to the nature of imperialism and the struggle against it, as well as the forms of struggle in countries with massive indigenous populations; and the philosophical implications of contemporary discoveries such as the unconscious, spatio-temporal relativity, or aesthetic techniques of representation. From its fifth issue the journal included a section headed ‘The trial against *gamonalismo*’, which aimed to denounce situations affecting the Indians. It remains to be said that Mariátegui published in *Amauta* more than half of the *Seven Interpretive Essays*, including significant parts of the

essays on Peru's economy (first), the land's problem (third), public education (fourth), regionalism and centralism (sixth), and literature on trial (seventh). Finally, the journal was one of the locates in which the 'polemic over *indigenismo*' took place.

### *The Polemic over Indigenismo*

This polemic constitutes an important chapter in Peru's intellectual history. Initiated in *Amauta's* pages, it brought together a wide range of opinions and statements on the nature, current status and possible solutions to the oppressed condition of the Indians. The main contenders in the polemic were Mariátegui and Luis Alberto Sánchez -the later a promising intellectual at that time, later related to both APRA and Haya de la Torre. Among other participants in the polemic, there were Enrique López Albújar, Luis Emilio Valcárcel, José Agustín Escalante, Antenor Orrego, Ventura García Calderón, Manuel González, and Manuel Seoane.<sup>39</sup>

Yet, what should be understood here by *indigenismo*? Mirko Lauer (1997) asserts that there existed in the period 1919-1940 two kinds of *indigenista* discourse in the Andes. On the one hand, there was a socio-political discourse championing the integration of the indigenous population in all aspects of social life. On the other, there was an aesthetic-cultural current whose aim was to incorporate the main elements of the indigenous cultural traditions (literature, painting and drawing, sculpture and weaving, music, archaeology and museography) in the country's cultural landscape. Mariátegui sought to connect both the aesthetical-cultural and the political-social elements, so as to propose 'the Indian' as the central element of the national reconstruction.

A brief summary of the polemic's antecedents is in order. In issues 4 and 5 of *Amauta*, Enrique López Albújar's "On the Indian Psychology" and Luis Emilio Valcárcel's "The Indigenous Problem" were published. At the same time, Mariátegui submitted to *Mundial* the series of articles 'Indigenism in National Literature' - in three instalments that will later comprise the section of 'Literature on Trial' that deals with indigenist literature. López Albújar (1976) depicted the Indian

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<sup>39</sup> A compilation of the main articles and columns written with regard to this debate was published in Manuel Aquézolo comp. (1976). See also Gerardo Leibner (1999) and Jorge Coronado (2009, ch. 2).

as two-faced, that is, she shows one face to 'civilization' and *mistas* (white people) and a different one towards themselves. Conversely, in a manifesto-like pamphlet Valcárcel represented in turn a 'mestizo Arequipa': in the mixture of the Indian and the European, the latter constitutes the decadent part, while the former boasts a "new social status". He set together Gandhi's active non-violence, Sorel's myth of general strike, and Bolshevism ("the dictatorship of indigenous proletariat seeks its Lenin") to advance what he called an 'Andean doctrine' ("*doctrina andinista*"), an effort at "aboriginal ideology" (1976: 26). Such a positive account of the indigenous character contrasts with López Albújar's, for whom the external face of the Indian – allegedly the only we can see and know – reflects a dishonest, thieving, superstitious, materialistic, and potentially treacherous nature; other features highlighted by the author are collective spirit, warrior nature, Spinozist-like pantheism, and addiction to coca leaf.

Mariátegui, in turn, offered in the pages of *Mundial* a general survey of the *indigenista* 'literature' produced over the recent period. In his account, the Indian comes to represent not a local or ethnographic colour but the very possibility of speaking of the Peruvian nation; the Indian is thus irreducible to a more abstract concept of the national, such as literary *criollismo*: "In Peru, *criollismo* has not only been sporadic and superficial, but it has been nourished on colonial sentiment. It has not been an affirmation of autonomy. [...] Our indigenism (*nativismo*), which is also necessary for revolution and emancipation, cannot be a simple *criollismo*." (Mariátegui, 1974: 271) *Criollismo* had been Luis Alberto Sánchez's designation for the more authentic moment of national letters (1921; 1974; cf. also Costigan, 1994). In Mariátegui's view, the definition of the 'national character' derived from this attribution only contributes to blur indigenous expressions, by means of an amalgamation of elements typical of miscegenation ideologies. Sanchez addressed the issue against Mariátegui in unusually aggressive terms, pointing out the absurd and barely constructive contours of the polemic and the non-sense in the coupling of *indigenismo* and socialism. Mariátegui's counter-argument, in turn, expressed that

from the confluence or amalgamation of 'indigenismo' and 'socialism', no one who looks at the content and essence of things can be surprised. Socialism organizes and defines the vindications of the masses, of the working class. And in Peru the masses –the working class– are four-

fifths indigenous. Our socialism would not be, thus, Peruvian –nor would it even be socialism– if it did not primarily support indigenous claims (1986: 217).

Sánchez's reply came in a more virulent fashion, echoing the idea according to which socialism operates by means of opportunistically taking up local discomfort in order to channel its own power ambitions. Mariátegui's next intervention was thus oriented to further define the socialist content of the claims:

The vindication that we argue for is that of labour. It is that of the working classes, without distinction between coast and highlands, Indian or *cholo*. If in this debate – that is, in theory – we distinguish the problem of the Indian, it is because in practice it is also differentiated in the facts. The urban worker is a proletarian; the Indian peasant is still a serf. [...] The primary problem that has to be solved here is, consequently, the liquidation of feudality whose expressions are two: latifundium and servitude. If we do not recognize the priority of this problem, yes it would be right, then, to accuse us of not being tied to Peruvian reality (2011: 176, trans. modified; cf. Mariátegui, 1986: 222)

In my view, the significance of the polemic lies in the recognition of the 'colour line' that cuts across Peru's class struggle, permeating the so-called 'superstructural' spheres such as literature and linking the Indian cause to socialism. The anti-Indian stance characteristic of Peru's entire history is, in Mariátegui's view, an index of the sensitivity of the country's superstructures to those of the imperialist conjuncture. On the other hand, the amalgamation of national and socialist tasks is a hallmark of the intuition of uneven and combined development that informs (albeit implicitly) Mariátegui's Marxism, drawing the lines along which contemporary battles for social emancipation were expressed through indigenous, subaltern elements. A close attention to vital cultural forces made apparent, in Mariátegui's account, their potential confluence with socialism, a possibility funded for instance in the affinities between political and aesthetic vanguards of the time – *indigenismo*. It is as though Mariátegui endows the Indian, presented hitherto as a monolithic and singular entity, both with the role of grounding and completing the nation, and of sharing the socialist paths of the working class.

By means of this debate, the prospects of the united front found a pathway of 'concentration' in the searching for a deeper dialogue between socialism and *indigenismo*, while 'polarizing' itself from those positions reactive to comprehend such an encounter. Therefore, the polemic over *indigenismo* constituted a decisive step in the maturation of a hegemonic will – understood as the attempt to synchronize the temporal lag separating the archaic and the modern. The terms of the debate were: the validity of the convergence of *indigenismo* and socialism in political-revolutionary terms; the valuation of the pre-colonial period as source of national elements, and the parallel criticism of the colonial and republican epochs; the consideration of the indigenous community as traceable back to the pre-colonial period; and finally, the possibility for the Indian, as a subject, to be the pivotal element of national reconstruction –rather than one of its discrete components and hence subordinated to a more abstract representation such as '*criollismo*' (in literature) or miscegenation (in socio-racial terms).

#### *Images from the Inka Empire*

The major part of the 1920s *indigenista* literature offered a vision of pre-colonial times as a period of splendid material and cultural growth, presenting an idyllic view of the Inka Empire. Mariátegui and Haya, along with Valcárcel and other members of the new generation, upheld what historian Juan José Villarías (1998: 306) calls the Campanella/Prescott economic model of the Tawantinsuyo. Supported upon canonical accounts written in colonial times, this model sustains the communist or socialist character of the Inka period. In Villarías' account, Tomasso Campanella's 1609 *La ciudad del sol* is the classic work in which the Inka people is presented as 'noble savages', following Michel de Montaigne's essays. This view will be followed by William Prescott's 1847 *A History of the Conquest of Peru*. Villarías relates the popularity of such a model to the decline of classic evolutionism.

There was nonetheless an alternative model at that time: the 'Smith/Cunow' model, which questioned the apologetic visions of the Inkas and stressed instead shortages in livestock for the common population, lack of technological advances, and the despotic rule displayed over non-Inka tribes (cf. Sobrevilla, 2005: 301).

Based on Adam Smith's reflections on America's role in the formation of the world market, as well as on the anthropology of Lewis Morgan, Heinrich Cunow's *Die Soziale Verfassung der Inkareichs* ('The Social Organization of the Inca Empire', of 1896) attempted to demonstrate that the alleged singularity of the empire was more related to the agrarian communism that preceded the empire than to the virtues of the Inka's polity (cf. Burga, 2005: 207ff). And nonetheless, the paucity of direct data from Inka or pre-Inka ages, and the fact that almost everything of the written and said about the topic pertains to post-Conquest times, makes the whole controversy seem more a matter of the discussants' projections than a proper research subject. Villarías concludes his survey that the reality of Inka empire has actually turned into the reality of the discussion about it.<sup>40</sup>

Peruvian historian Alberto Flores Galindo's *Buscando un Inca* ('Searching for an Inca') offers another register for looking into this subject. Echoing Mariátegui's focus on the indigenous 'myth' of the restoration of Tawantinsuyo, he reconstructs the formation of an Andean utopia crystallized in the figure of the 'return of the Inca', named *Pachakutec* or *Pachakuti*. Pachakutec, Pachacuti, or Pachakutiq, was the Inka ruler Yupanki, the builder of the Tawantinsuyu empire ruling over the Cuzco valley and beyond until the Spanish conquest. Yupanki gave himself the name of Pachakutiq, which means 'reverser of the world'. The myth of Pachakutec or the return of the Inka is read by Flores Galindo as the restoration of the Tawantinsuyu.

In this sense, "Inka" - Flores Galindo adverts - "means ordering idea or principle", the end of chaos and darkness. This restoration utopia has been forged as imaginary reaction to colonial and post-colonial living conditions; "previously, the Andean past was reconstructed and transformed in the memory in order to be converted in an alternative to the present. This is a distinctive feature of Andean utopia." (1987: 49) The power of such a utopia becomes manifest in the apparent contradiction which it generates: "A relatively short period in Andean history, during which state coercion was imposed upon peoples and regions, was converted into a prolonged time in which starvation did not exist, goods were equitably

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<sup>40</sup> This implies, as Silvia Tieffemberg (2003) asserts, that the Inca empire becomes "an object which begins to gestate from colonial discursive practices, of clear European enunciation, in the second half of the 16<sup>th</sup> century".

shared and epidemic calamities were not borne. An inverted image of the colonial world.” (1987: 88)

This was indeed the foundational memory of the 1770 Tupac Amaru II rebellion, considered by Flores Galindo as the “culmination or highest point of a cycle of rebellions” (1987: 109) against the ruling order, and which continued during the early 20<sup>th</sup> century in other historical yet quasi-mythical figures such as Rumi Maqui in 1915.<sup>41</sup> After the repression of Tupac Amaru’s outburst – Flores Galindo concludes – the extent to which this utopian belief spread among Indians across regions, ethnic differences and lifestyles remains an index not only of the cultural standardization that affected this population, but also the material evenness produced once the colonial indigenous aristocracy was made to disappear. From then onwards, “Indian and peasant were synonymous; later both terms would be equivalent to savages, opposed to civilization and Western world” (Flores Galindo, 1987: 237) The topic of myth is the subject of our next chapter; let us simply note here that the homogeneous condition attributed in Mariátegui’s appellation to ‘the Indian’ is grounded on these considerations.

Roughly speaking, Haya and Mariátegui shared what Villariás names the Campanella/Prescott model of the Tawantinsuyo as a form of primitive communism,<sup>42</sup> at a time when Marx’s notion of ‘Asiatic mode of production’ was not yet widespread. However, when further specified this similar approach evidences two different ways in which the image of the Inka Empire is mobilized. While Haya pointedly highlighted the state organization achieved during the Inka period, Mariátegui sought to stress the communitarian and collective features of its people, still present in and acting upon the country’s forms of sociality. Haya compared, for instance, the Andean *ayllu* to the Russian *mir* saying that:

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<sup>41</sup> Mariátegui offered an early account on the figure of Major Teodomiro Gutiérrez, alias Rumi Maqui (‘stone hand’ in Quechua) in his 1915 article for *La Prensa* ‘The Condor Passing’; a later reference of 1929, in Mariátegui (2011: 320).

<sup>42</sup> This was also the conception of Rosa Luxemburg: “it was not the devotion to abstract principles of equality and freedom that was the basis of primitive communism, but the pitiless necessities of a less developed human civilization, the helplessness of humanity in the face of nature, which forced them to stick closely together in larger alliances, and to act methodically and collectively with respect to labor and to the struggle for life as an absolute collective condition of existence.” In Peru, Luxemburg concludes, “one communistic community established itself as the exploiter of another.” (2004: 78–9) The similarity between this approach and Mariátegui’s shall become evident in what follows.

In their eagerness to Russify Indo-America, some people opine that *ayllu* is the same as Russian *Mir*. The parallel is superficial, one-sided, and false. In Inka communism there are two fundamental aspects: that of primitive communism proper, similar to patriarchal communism of Asia and Europe, and the *organization* of that primitive communism [...] in a vast political and economic system. (1977b: 206)

In contradistinction to other developments from collectivism to private appropriation, the historical singularity of this social organism rests on the fact that Inka's "primitive communism becomes an economic and political system. The Inca system does not base itself on private property" (Ibid.). In Haya's account, the stage of primitive communism was elevated by the Inka state to a superior category.

Mariátegui's attention, on the other hand, focused not so much on state-communism but rather on *ayllu* communities. In the first part of *Seven Interpretive Essays*, the pre-colonial period is described as a state that basically allowed, even fostered, the relative economic autonomy and self-subsistence of these communities.<sup>43</sup> To have sustained its own vigour on the *ayllu* appears for Mariátegui as the Inkas' central virtue: "The *ayllu* –the community– was the nucleus of the empire. The Incas unified and created the empire, but they did not create its nucleus. [...] The Incas did not disrupt anything." (1974: 75–76) I argue that Mariátegui's was the attempt to make visible the indigenous affinities to socialism from the point of view of the *cultural memories* embodied in the collective forms and taking the form of *ayllu* communities. Alberto Flores Galindo (1991: 76) and Miguel Mazzeo (2009 ch. 1 and 2) argue that the *Essays'* hallmark lies in the acknowledgment of the 'elements of practical socialism' present in Peru's social structure. The concept appears in the third essay ('The Problem of Land') when, dismissing liberal solutions to the agrarian and Indian questions, Mariátegui asserts: "Aside from reasons of doctrine, I consider that our agrarian problem has a special character due to an indisputable and concrete factor: the survival of the Indian

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<sup>43</sup> Mariátegui's image of the Inka Empire exalts the features already mentioned by the historical evidence at hand: people there "... lived in material comfort. With abundant food their population increased. [...] Although the collectivist organization directed by the Incas had weakened the Indians' individual initiative, it had instilled in them the habit of a humble and religious obedience to social duty, which benefited the economic system. The Incas derived as much social utility as possible from this trait. [...] Collective work and common effort were employed fruitfully for social purposes." (1974: 3–4)

'community' and of elements of practical socialism in indigenous agriculture and life." (1974: 33)

Peruvian sociologist Hildebrando Castro Pozo's *Our Indigenous Community* (1924) is profusely used in Mariátegui's examination of the present status of such social form. Castro Pozo did not pretend to trace its origins or to answer whether or not the nature of this community has been altered from pre-colonial times; rather, his intention is to hold a systematic account of its present-day status. The still existing *ayllu* exhibits in this account two main features: collective property of land, and kinship bonds that tie different families that belong to it. Mariátegui further enumerates the myriad of forms that correspond to those features: "First - agricultural communities. Second - agricultural and livestock communities. Third - communities of pasture lands and watering places. Fourth - communities that have the use of the land" (1974: 57), all of which amounts to the following conclusion:

These differences have developed not through the natural evolution or degeneration of the ancient 'community', but as a result of legislation aimed at the individualization of property and, especially, as a result of the expropriation of communal land for the latifundium. They demonstrate, therefore, the vitality of the Indian 'community', which invariably reacts by modifying its forms of cooperation and association. The Indian, in spite of one hundred years of republican legislation, has not become an individualist. And this is not because he resists progress, as is claimed by his detractors. (Ibid.)

The vitality exhibited by these associative ways of worlding is associated here to the contemporary entanglement of social elements that have survived to liberal state policies as well as to extra-legal appropriation of land by large landowners. The *ayllu* embodies their historical continuum: "in Indian villages [...] hardy and stubborn habits of cooperation and solidarity still survive that are the empirical expression of a communist spirit. The 'community' is the instrument of this spirit" (1974: 58). The contemporaneous character of such 'spirit' makes the *ayllu* a living organism supplied with "unmistakable potentialities for evolution and development." (1974: 56) It is worth noticing the similarity of this formulation with

Marx's evaluation of the future of the Russian commune, as displayed in unpublished texts that could not be known at Mariátegui's times (cf. Marx, 1983).

In consequence, Flores Galindo correctly concludes that the contrast between Haya de la Torre and Mariátegui puts into evidence two different strategies of mobilization of the Inka images: what appears in the former as focus on the state organization, let's say, from above, becomes in the latter the grassroots constitution of a society of producers that remains actualized in present times, at least in its crucial components (in 'spirit'). This difference was indeed mirrored in the progressive divergence of political strategies that Haya and Mariátegui displayed, as we will see immediately. What this account shows is a strategy in which past-images are instrumental in legitimizing a state-based political project (Haya's), and a different one in which the past is read from present-day demands, that is, from the urgencies of the actuality of revolution. In a 1924 article, Mariátegui explained that "the ability to comprehend the past is in solidarity with the ability to feel the present and to disquiet of the future. The modern man [sic] is not only who has further progressed in the reconstruction of what already was, but also who has most advanced the forecast of what will be." (1986: 33) This is the guiding perspective of his examination of the potential synchronization between Indian memories and socialist horizons.

#### **4. Haya and Mariátegui: On the Rhythms of Capitalist Development**

##### *Modern Feudalism... or Semi-Feudalism?*

Haya and Mariátegui also shared the consideration of feudalism as a social model imported to Latin America by Spanish conquest, superimposed upon and eventually spoiling the former setting of primitive communism. In Haya's terms, "[t]he conquest brings a new system, but cannot extinguish the former. Imported feudalism does not accomplish a task of integral evolution. It is juxtaposed to the autonomous system and becomes coexistent with it." (1977b: 200-01) By means of the independence revolutions, the emancipated feudal class captured political power by economic reasons, mirroring the capitalist classes of central countries;

however, it “preserves the feudal type of social organization, adds free trade to it, and adapts republican regimes –copies of the European revolutionary methods of the period– to its new autonomous organisms.” Feudalism is thus the social system that characterizes Latin America well until current times, when imperialist capitalism comes to reinforce the it: “British imperialism first and North American [...] have more and more heavily laced up the feudal apparatus of our countries.” (Ibid.)

Conversely, Mariátegui in the *Essays* uses the term ‘semi-feudalism’ along with, and perhaps confusingly with, that of feudalism. I argue that the idea of semi-feudalism is here not so much an analytical category, but rather a form of relativizing or suspending the meaning of the notion of ‘feudalism’ itself, so as to try a new usage. In other words, the reference to semi-feudalism is projected upon the “feudalism of the *gamonales*” (1974: 22), a very specific and concrete phenomenon, as we will see immediately. Consequently, it should not to be translated into any general category. This is implicitly asserted in the following comparison: “Within European feudalism, the elements of growth –the factors of town life– were, in spite of the rural economy, much greater than within Creole semi-feudalism.” (1974: 18, trans. modified) Although unsystematically, Mariátegui tried to keep distance from straightforward usages implying similarities among evidently dissimilar processes, taking instead into consideration the concrete particularities of each situation.

One of the most particular features of Peru’s social system at Mariátegui’s time rested on ‘*gamonalismo*’. Flores Galindo explains that the etymological root of the word comes from *gamonito*, a plant that lives parasitically from other plants and trees. Flores Galindo goes on to explain that “The term ‘gamonal’ is a Peruvianism coined during the last [i.e., nineteenth] century, which searched to establish a simile between a parasitic plant and the landowners. [...] The term designated the existence of the local power: the privatization of politics, the fragmentation of control and its exercising at the town- or province-scale.” In this vein, Mariátegui gives the term a broader analytical meaning:

The term *gamonalismo* designates more than just a social and economic category: that of the *latifundistas* and large landowners. It signifies a whole phenomenon. *Gamonalismo* is represented not only by the

*gamonales* but by a long hierarchy of officials, intermediaries, agents, parasites, and so forth. The literate Indian who enters the service of *gamonalismo* turns into an exploiter of his own race. The central factor of the phenomenon is the hegemony of the semi-feudal landed estate in the policy and mechanism of the government. (1974: 30)

*Gamonalismo* as social phenomenon lasted in Peru until well into the second half of the past century. Jesús Chavarría (1979: 115) has argued that it corresponds to the point of intersection of class and race in Peru. Jorge Oshiro points out in turn that it was a practice at once oppressive and integrative, and that in this ambivalence rest its importance. On the one hand, *gamonalismo* is the tyrannical exercise of power upon the Indian, either by the landowner or by one of his foremen – not infrequently an indigenous person. The latter, a sort of “second-type *gamonal*” (Oshiro, 2013: 435) – the subaltern who nonetheless oppresses his fellows – appears on the other hand as “the true nexus for the oligarchy to control the indigenous masses” (2013: 436). This second-type *gamonal* was affectively tied to the indigenous culture; not only that: the more the *gamonal* identified himself with the Indian, the more he was eager to oppress him or her.

*Gamonalismo* can be seen in consequence as a form of integration and subalternisation at the same time; for Oshiro, it was paradoxically “the only social instance where Hispanic and indigenous cultures were relatively integrated, which is why it enjoyed a sort of consent by those it exploited themselves.” (Ibid.) As one might say today, it was a form of biopolitical power – not just an economic or social subjection – insofar as it performed and was performed by corporal and subjective dispositions of the agents, beyond their class or ethnic adscription.<sup>44</sup>

Given the dominance of landowners and *gamonales*, both Mariátegui’s and Haya’s accounts consider the nineteenth century’s revolutions of independence in Latin America as events close to what Gramsci termed ‘passive revolutions’, that is, revolutions from above, without popular participation.<sup>45</sup> In the *Essays*, Mariátegui

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<sup>44</sup> José María Arguedas’ novel *Todas las Sangres*, published in 1964, remains perhaps the best literary representation of this institution.

<sup>45</sup> In reference to the Italian process, Gramsci explained that “the historical fact that popular is missing from the development of Italian history, as well as the fact that ‘progress’ occurs as the reaction of the dominant classes to the sporadic and incoherent rebelliousness of the popular masses – a reaction consisting in ‘restorations’ that agree to some parts of the

explains that the independence war “was another political event. It, too, did not bring about a radical transformation in the economic and social structure of Peru: but it initiated, notwithstanding, another period of our history.” (1974: 29) The period initiated by these independence wars took the form of a revolution from above which did not radically alter the economic structure of these countries, and that has implied in Latin America the postponement of national and democratic demands. The non-resolved tasks supposedly attached to a bourgeois revolution – the liquidation of large land estates, the liberation of the peasants from bondage, and the consequent democratization of the nation – remain for both Mariátegui and Haya the most urgent issues to be solved in these countries.

*Haya de la Torre: Imperialism as ‘Arrhythmic’ Capitalism*

Passive revolutions are thus the historical background for imperialist penetration in Latin America. In Haya’s account, imperialist forces acquire in these countries the role of class-interests and impulses, thus replacing a proper bourgeois class. Therefore, under imperialism the bourgeoisie remains “an ‘invisible’ class. It is the same big bourgeoisie of powerful distant countries”. Consequently, “imperialism fulfils in them [Latin American countries] the function that the grand bourgeoisie does in the economically more highly developed countries.” (1977a: 152) Local oligarchies, largely embedded in feudal strata, take up the interests of imperialist capitals and match them with their own. As a consequence, Latin American productive forces are arrested in this imbalance, brought to a standstill, with no ability to unleash the enormous wealth of the continent, thus retarding the development of its peoples. If capitalism – Haya goes on – is the rule of the anarchy of production, imperialism represents such anarchy but exacerbated a fact that amounts to slowing down the Latin American economic structures.

This perspective is not far from a certain evolutionist Marxism, in which a stageist succession of economic phases is required for a country to be ‘ripe’ for a socialist revolution. Arguing for the historical necessity of capitalism, Haya declares that “the proletarian, socialist revolution will come later. It will come when our

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popular demands and are therefore ‘progressive restorations’, or ‘revolutions-restorations’, or even ‘passive revolutions’” (2011: 252; see also Thomas, 2010: 145–46)

proletariat is a distinct and mature class, able to lead by itself the transformation of our peoples. But this will not occur until much later.” (1977b: 154) Nonetheless, Haya distances himself from Marxism, particularly from its Leninist version, setting out instead a ‘neo-Marxist’ thesis: imperialism would be not the *last* but the *first* stage of capitalism in Latin America. In a decisive passage, he explains that “what is in Europe ‘the last stage of capitalism’, in Indo-America proves to be the first one. For our peoples, the immigrated or imported capital sets the initial stage of their modern capitalist age”. The central critical reference here is, of course, Lenin’s *Imperialism* (1996 [1917]). About that pamphlet, however, Haya seems to be only concerned with the image of a sequential order cast by Lenin’s work, and barely, if at all, with the argument about imperialism’s global mechanisms (cf. 1977b: 18–9). ‘Imported’ by imperialism to Indo-America in a process that combines economic exploitation and national subjugation, capitalism has been the source of distortions in what could otherwise be a ‘normal’ development: imported capitalism provokes “the dual character of our economy, which imperialism splits in two intensities, two rhythms, two modes of production –the backward national one and the accelerated imperialist one” (1977b: 24).

Haya proposes a sui-generis perspective on capitalist development while claiming the necessity of what Marx called its ‘harsh tributes’. The Peruvian leader explains that “the capitalist system, of which imperialism is the highest expression of plenitude, represents a mode of production and a degree of economic organization superior to all the rest the world has known before, and in consequence the capitalist form is a necessary step, an inevitable period in the process of contemporary civilization” (1977b: 16) The crucial problem for Latin American countries is situated in the non-linear and therefore ‘uneven’ development, evident in what he suggestively calls the violent juxtaposition of economic systems. (1977b: 155) The conclusion drawn from this perspective is worth citing at length:

Two kinds of economy –two speeds, two economic intensities– interplay in Indo-American social life. One forming part of the system of big capitalism, subject to a more intense rhythm, whose origin and command are alien to us; and the other forming our own slower and incipient kind of national development. Within the large capitalist

system, the latter represents the distant stage of the initial paths; the former, the culminating and powerful forms of modern plenitude and overflow. Thesis and antithesis which impose a synthesis of equilibrium and freedom within the plan of a new Indo-American economy, not excluded from the worldwide economic-social evolution, but capable of halting forever imperialism's subjugation and oppression.

In order to achieve such a synthesis of equilibrium and freedom, a double and simultaneous task is mandatory –to boost and accelerate the evolution in those backward zones of our economy; to vigorously and definitively stop and reject imperialism's progresses. (1977b: 215)

Robert Paris (1984: 5) has acutely noted that this 'first stage' thesis brings to mind the ongoing rapacity of capitalist forces in the 'periphery', putting into evidence the present nature of an everlasting process of primitive accumulation – what Roger Bartra called "permanent primitive accumulation" (1993: 33). Primitive accumulation does not represent a stage of capitalism left behind in time, but its *present time* in so-called backward zones of the globe, notably in the Global South. However, I contend that the sentence has also another meaning in Haya's perspective, one which refers to the necessity of a certain degree of foreign capital as a salutary, even necessary fact in order to boost the productive forces in these countries. "Let's repeat" – Haya says – that "within the dialectic of the world capitalist system, our countries have no possible liberation. Imperialism is a stage of capitalism –as I have already repeated, it is the culminating one. Our countries are in the first stages of capitalism or going toward them." (1977b: 156) Therefore, in the political discourse of Haya de la Torre there lies a manifest deep ambiguity about the role of foreign capital *as capital*, something which conversely undermines his criticism to imperialist capitalism: "it is necessary to combat imperialism, but certain doses of it seem to be required..." (Ibid.)

This ambiguity was transferred into APRA's political program. Such a program made the case for an 'anti-imperialist state' able to counteract (first in a defensive moment, later as a 'war state') imperialist forces. Later on, this new nation-state will be the 'proxy' of local, developing capitals at the international markets. Insofar as these national capitals are incipient, Haya goes on, to postulate a

definitive delinking from foreign capital is an unreal policy. That is why the anti imperialist state must be strong enough so that to limit the amounts of, and the branches in which, foreign capitals are invested, safeguarding thus national interests (cf. Haya de la Torre, 1977a, ch. VII; also 1973, part III). As it was seen, the proletariat is deemed to suffer a similar process: given the precociousness of the working classes in this continent, “an Indo-American anti-imperialist party cannot be of an exclusive class [...] it must be a national party of united front, grouping all social classes threatened by imperialism.” (Haya de la Torre, 1977a: 96) As soon as the anti-imperialist state has been stabilized, “the three classes oppressed under imperialism – our young industrial proletariat, our vast and ignorant peasant and our impoverished middle classes – will constitute the normative social forces of this state.” (1977a: 23)

In sum, from the viewpoint of Latin America’s condition as composed by a retarded capitalist development and an immature proletariat, Haya promoted a multi-class party under middle class hegemony as the organization capable of both seizing power and driving a state so as to channel the immature capitalist economy to its higher stages, within the frame of a more harmonized and fairer world market. We will return in the next chapter to the theoretical grounds of this perspective. Suffice to highlight by now the fact that Haya seems to combine in his account a noticeable sensibility towards different developmental rhythms with a stark economic determinism. In doing so, he envisaged the hetero-temporality of world capitalism at the same time that he blocked this insight by means of a linear temporality in which the sequence of primitive communism, feudalism, capitalism, and socialism was considered as one linking inevitable historical phases. In other words, the plurality of tempos or rhythms that the experience of uneven and combined development arguably yielded in his more analytical works as well as his political projects becomes something of an arrhythmia when imperialism is considered as a mere transposition of phases disturbing a normal, spontaneous capitalist development.

Mariátegui held an understanding of imperialism in contradistinction with Haya's and closer to what Lenin called the 'superstructure' of capitalism in its highest stage. Right after the APRA division in which both Peruvian leaders inaugurated the polemic between *Aprismo* and Marxism (a polemic whose presence in Peru's politics lasted until well into the second half of the past century), in September 1928 the editorial of the 17<sup>th</sup> issue of *Amauta* expressed the difference in the following terms:

The epoch of free competition in the capitalist economy has ended in all fields and all aspects. We are in the age of monopolies, that is to say, empires. The Latin American countries arrived too late to capitalist competition. The first positions are already definitively assigned. In the capitalist order, the destiny of these countries is that of simple colonies. (Mariátegui, 2011: 129)

Denying the possibility of a harmonious capitalist world market from which an 'anti-imperialist state' could benefit, Mariátegui adopts Lenin's conception of imperialism as the stage in which competition shifts from the national to the international setting. The end of competition means more precisely the end of 'free' competition; heretofore, capitals unfolded through larger unities (trusts, cartels), taking the state over and orienting it towards the rest of the world by means other than 'economic' - i.e. political and military. This stage of inter-state competition builds itself up as the 'superstructure' of the world system, thus determining regional and national conjunctures. In this sense, revolutionaries must deal with a superstructure which is no longer 'just' national. And this is precisely the problem faced by the so-called colonial and semi-colonial nations. Despite the apparent rigidity that the idea of the 'colonial and semi-colonial' achieved in the Communist discourse of that time, in Lenin's *Imperialism* the term functions as a way to distinguish formal (political) colonies from nations that, while formally independent, display varied forms of economic dependence and extra-economic fragility.<sup>46</sup> Accordingly, Peru - and Latin America broadly speaking - was

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<sup>46</sup> A partial account on the idea in the Comintern debates, with particular references to Latin America, can be found in Manuel Caballero (1986: 45-6; see also Part Two), in which the author enumerates the Comintern's outline of semi-colonial condition as a specific form

understood by Mariátegui as part of this semi-colonial world; yet the specificity of this region's history should not be eclipsed by such a status: Latin America's trajectory of coloniality needed to be closely considered in order to derive a political strategy from its post-colonial condition.

In a well-known and much-discussed statement of *Seven Interpretive Essays*, Mariátegui depicted the Peruvian economic structure, asserting that

elements of three different economies coexist in Peru today. Underneath the feudal economy inherited from the colonial period, vestiges of the indigenous communal economy can still be found in the sierra. On the coast, a bourgeois economy is growing in feudal soil; it gives every indication of being backward, at least in its mental outlook (1974: 16).

This assertion is only superficially akin to Haya's image of juxtaposed economic rhythms: what the latter reckons as an overlapping of different stages (times) in a single place (space), in Mariátegui becomes the coexistence and mutual co-belonging of the 'archaic' and the 'modern', whose interplaying defines a concrete totality. There are thus three different kind of productive relations –modern waged labour, serfdom, and communal work. The latter corresponds to the 'elements of practical socialism' embodied in still-alive *ayllus*. Conversely, waged labour had been largely deployed by foreign capitals, mainly in the export sector such as the northern coastal agriculture (cotton and sugar), the extractive sector in the highlands (coal) and the coast (oil), railway building, and banking and commerce. Finally, feudal *gamonalismo* exhibited a presence which extends even into allegedly modern industries such as coastal *haciendas*, thanks to hook-indenture (*enganche*) and *yanaconazgo*.<sup>47</sup> In an illuminating passage, Mariátegui describes those forms of semi-proletarianization:

Through hook-indenture and *yanaconazgo*, the large proprietors block the appearance of free-wage contracting, a functional necessity to a

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of dependency to foreign capital, a rigid idea of feudality, and a correspondent uniform political tactics.

<sup>47</sup> *Yanaconazgo*, was a residual element coming from the economic and social structure of the late Tawantinsuyu, preserved by the Spanish empire, a form of serfdom in which the Indian was attached to land and served directly to the ruler. As Mariátegui and Castro pozo demonstrated, *yanaconazgo* was transformed in the Republican period, however it did not disappear.

liberal and capitalist economy. Indenture, which prevents the labourer from disposing of his person and his labour until he satisfies the obligations he has contracted with the landlord, is unmistakably descended from the semi-slave traffic in coolies; *yanaconazgo* is a kind of servitude in politically and economically backward villages that has prolonged feudalism into our capitalist age. (1974: 63, trans. modified)

In this sense, forms typical of slavery and serfdom are incorporated into capitalist industries, preventing from the outset the development of a 'normal', liberal capitalism. In this consideration, the colour line intersects the composition of class and, consequently, of class struggle. As the third of the *Essays* profusely indicates, for Mariátegui the political content of a proper national revolution has first and foremost to solve the semi-feudal condition of the country – the 'consubstantial' issues of large landowning and servitude exhausting indigenous ways of working. However, and in contradistinction with Haya's project, in Peru semi-feudalism and capitalism go hand in hand and determine together, first, the concrete shape of the country's economic basis, and second the contents and forms that class consciousness and class interests assume. In other words, the consubstantiality of imperial capitalism and *gamonal* semi-feudalism defines for Mariátegui the form and contents of Peru's class struggle.

In the document entitled 'The Problem of Races in Latin America'<sup>48</sup>, addressed to the First Latin American Conference of Communist Parties held in Buenos Aires in 1929, the Peruvian delegation insisted that the 'racial' factor plays a role difficult to underestimate in the region's class conflicts: "The problem is not racial but rather social and economic. But race has a role in it and in the methods of confronting it." (2011: 325, trans. modified) Not an abstract role to be sure, for it depends on the historical conditions and particular assembling of its constitutive elements. In Peru, the racial factor has drawn a permanent and ubiquitous division-line between owners and producers, dominant and subaltern: "In these countries, the race factor is compounded by the class factor, which revolutionary politics must

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<sup>48</sup> Harry Vanden and Marc Becker translate the document's title in the singular (i.e., 'race'); I prefer instead to keep the plural (*razas*) that Mariátegui gave to the article. Cf. Mariátegui (2011: 305; 1987: 21).

take into account.” (2011: 314). Therefore, the indigenous factor crosses any rigid division line of peasant and worker, of seemingly motionless and regressive ‘autochthonous’ elements and active and progressive ‘external’ forces such as modern techniques, as this decisive remark of ‘The Problem of Races’ evidences: “Indians are in no way inferior to the *mestizo* in their ability to assimilate with progress, with modern production techniques. On the contrary, they are generally more able to do so. [...] In the mines and factories of the Peruvian highlands, the Indian peasant confirms this experience.” (2011: 311, trans. modified)

In this passage, the scalability of pre-capitalist social forms to cope with and develop modern capitalist techniques is confirmed by the activity of *peasants*, indicating that the hybridity which features the process of labour subsumption into capital projects a role for indigenous peasants (as well as workers) in the country’s class struggle and in its socialist solution. As the concluding remarks from the same text points out: “among ‘backward’ populations, no one like the Inka indigenous people brings together such favourable conditions for their primitive agrarian communism, which survives in concrete structures and in a deep collectivist spirit, to be transformed *under the hegemony of the proletarian class into one of the more solid bases for the collectivist society heralded by Marxist communism.*” (1987, 68) The reference to the indigenous population as ‘Inka people’ and its roots in agrarian communism is synchronized by Mariátegui with the prospects of collective work, in a manner which contrasts (and might in consequence be read as an implicit critique of) the processes of forced collectivization of land undergone in the URSS since the late-1920s (cf. Webber, 2015: 593).

Read from a materialist viewpoint, what Mariátegui and most of his contemporaries called the ‘racial’ question comes to play a role in the class struggle and is irreducible to any abstract set of policies. Albeit not formulated in explicit terms, Mariátegui’s understanding of imperialism includes racism as a constitutive part of the capitalist ‘superstructure’, in terms close to Lenin’s. This is not to say that imperialism produces racism in a one-sided deterministic way; rather, racism is re-created, re-defined and ‘overdetermined’ (to borrow Althusser’s term) by capital’s uneven-and-combined organization of social practices and conflicts. To be subsumed within the international frame built up by monopoly capital gives racism a form to re-operate upon the economy. (That is the reason why *Seven Interpretive*

*Essays* – a work which situates itself at an ‘economic’ level of analysis<sup>49</sup> – includes four essays that, from a non-dialectical standpoint, give the appearance to deal with ‘cultural’ topics.) Mariátegui not only comprehended ‘economy’ in a non-narrow sense; for him, moreover, the crux of Peruvian reality rests precisely on the affinity of the particular colonial and racist superstructure it has developed with that of imperialism. In doing so, Mariátegui’s Marxism became nested in a conception of ‘racialized class struggle’.<sup>50</sup>

This affinity of post-colonial Peruvian structures and imperialism finds its dialectical counterpart in the kinship between the socializing tendencies of capitalism and the collectivist inclinations displayed by indigenous people. Lenin considered imperialism as a stage in which, along with the further exploitation of labourers worldwide, the socialization of production has also expanded in scope and profundity. Based on this perspective, Mariátegui draw a parallel between this socialization with the cooperative forms of production exhibited by Peru’s indigenous peasantry.<sup>51</sup> The tenacious survival of the communitarian forms embodied in *ayllu* invites us to consider the elements and grounds it shares in common with the socialization of production accomplished under capitalist roads.

## 5. Uneven and Combined Development and the National Question Reframed

Framed under the experiential perspective of uneven and combined development – if not explicitly in terms of its theoretical concept – Mariátegui projected the actual combination of national and socialist tasks demanded by a racialized class struggle. This qualification of Peru’s class struggle exhibited *gamonalismo* and imperialism as

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<sup>49</sup> This is the most general reading of Mariátegui’s remarks in *Essays*’ ‘Author’s Note’: “I intended to include in this collection an essay on the political and ideological evolution of Peru. But as I advance in it, I realize that I must develop it separately in another book.” (1974: xxxiii)

<sup>50</sup> I owe the notion of ‘racialized class struggle’ to Jeffery Webber (cf. 2011: 29fn; 2015: 310).

<sup>51</sup> Although stated in several documents, Mariátegui wrote in 1926 an important article for *Mundial* (‘The Future of Cooperatives’) where the focus is put precisely on these affinities. He explains that cooperatives take place only when first a capitalist and then a syndicalist/union basis have been established; consequently, the cooperatives’ development in Peru must be subordinated to those processes. “And yet”, Mariátegui asserts, “Peru is one of the Latin American countries where cooperation finds more ingrained spontaneous and peculiar elements [...] in the indigenous peasant centres, the communitarian traditions offer elements of an integral cooperativism.” (1987: 195–96)

partaking of the dominant bloc, while the proletariat and the indigenous peasants stand on the subaltern side. The stress put on the colour line was – if my reading is correct – a consequence of his understanding of imperialism as the superstructure of capitalism in its contemporary stage, and of the affinities between it and the post-colonial tendencies of the country. Conversely, the confluence of anti-feudal and socialist tasks is the dialectical entanglement in which Lenin envisaged the potential ‘acceleration’ (at the economic as well as the ideological levels) of revolutionary processes in the so-called colonial and semi-colonial world (cf. Lukàcs, 1972: 45).

In a similar vein, Trotsky (1967, I: 23; cf. Davidson, 2006: 21) referred to this acceleration as “the privilege of the historically backward” under conditions of uneven and combined development. In Mariátegui’s account, in turn, the consideration of the Indian as an *object of socialism* because of his alleged backwardness is transformed into a viewpoint in which the ‘backward’ element itself displays an anticipatory momentum for a socialist project. Considered as both remaining of past modes of productions and present-day factors in the country’s class struggle, the features of the Andean indigenous traditions, ways of worlding, and forms of resistance to capital are expressive of a form of communism that is contemporaneous with modern socialism. It is therefore the very nature of Peru’s socio-economic structure – and not any abstract, mechanical dictum of fate – which lays down the material basis for the alliance of workers and peasants set out by the tactics of the united front. Yet in order to achieve this conclusion, Mariátegui ought to locate his reflection in what György Lukàcs considers to be the core of Lenin’s theoretical achievement: the ‘actuality of the revolution’ under imperialist capitalism.

As Lenin understood it, imperialism corresponds to the epoch in which the bourgeoisie overtly renounces to its progressive, revolutionary character at the global scale. The bourgeoisie becomes reactionary, which implies that the progressive character of world history passes thereby to the other, antagonistic world power: the proletariat. In the identification of this “dialectical transformation of the bourgeois revolution into the proletarian revolution” Lukàcs (1972: 48–9) situated Lenin’s genius. And it is arguably a similar consideration that led Mariátegui to consider that the revolutionary epoch opened up by the world crisis drifts into one of these paths: ‘passive revolution’ or ‘socialist revolution’. During

Leguía's time in office, the strengthening of economic bonds with North American capitals seemed to lay the foundations for a process of capitalist modernization by means of 'passive revolution', with only rhetorical or patronizing roots in popular groups and demands. Similarly, a middle-class overthrow of the 'oligarchic republic' as envisaged by Haya's APRA was also considered by Mariátegui as devoid of the decisive initiative of subaltern groups. Its ambiguous opposition to imperialism, added to Haya's inclinations to an authoritarian leadership, portrayed a mirror-like image of Leguía's project.

To put it otherwise: is not that 'national' and 'socialist' revolutionary struggles simply look alike, nor that certain elements of the former might just opportunistically be taken up for the prosecution of the latter. On the contrary, the revolutionary content of the national question displayed in 'colonial and semi-colonial' countries (that is, in the Global South understood as the location of different temporalities) finds its truth, so to speak, in socialist revolution, in a revolution of proletariat hegemony capable of accomplishing the non- or ill-resolved bourgeois-democratic tasks. Otherwise, it will become another passive revolution. Dialectically, the proletariat envisages its own very potential as a progressive hegemonic force in the demands of the other subaltern classes, notably the peasants, as a living image of its own historical composition. Insofar as the 'Indian problem' weights thoroughly upon Peru's social structure, such a 'national deficit' exerts a material and symbolic influence upon subaltern classes as a whole, affecting its ideological configuration. For, if Marx's claim that any nation that "oppresses another people forges its own chains" (2010: 120) is generally valid, it is so first and foremost when this occurs within a determined 'national' conjuncture. Accordingly, Mariátegui expressed in the *Essays* that "Peru has to choose between the *gamonal* and the Indian; it has no other alternative." (1974: 171)

This is the 'national' departure point acknowledged by Gramsci, who nonetheless advises that 'the perspective is international and cannot be otherwise'. Mariátegui understands the consequences of this dialectic in terms similar to Gramsci, who also points out that "*the leading class is in fact only such if it accurately interprets this combination, of which is itself a component and precisely as such is able to give the movement a certain direction...*" (2003: 240, emphasis added) This historical fact presents the need to dialectically relate the indigenous conditions

(their alleged 'out of sync' with the capitalist 'now') and potentialities (to become synchronized to the proletariat) to the international setting in which 'race' plays an important role in the colonial enterprises of imperial powers; and then to bring it back to the national conjuncture characterized by a colonial history. From a 'national' (i.e. indigenous-based) departure point, and through 'international' (proletarian) perspectives, Mariátegui's analysis brings to the forefront a particular sort of *encounter* envisaging the potential synchronicity between the old communist spirit and modern socialism.

In Mariátegui's reading of the national question from the standpoint of the subalterns, I find a strong indication of the subalternist hypothesis. The crisscrossed roads of imperialist racism and local colonialism, on the one hand, and of international socialism and autochthonous communism, on the other, opened in his Marxism a pathway to coming to terms with a materialist dialectics of a very specific kind. In it, the temporal dimension (past and present) overlaps with the geographical one (international and national) at the eve of the actuality of revolution. The Indians' potential inclination to communist worldviews and collective practices ('elements of practical socialism', that is) demands an approach capable to take up the Inka image of the Pachakuteq – the restoration of Tawantinsuyu – not as any dream of restoration of the past; rather, it ought to be 'translated back' to present demands imposed by worldwide contemporary tendencies. The manner in which this translation was outlined within Mariátegui's Marxism is the subject of Chapter III.

To recapitulate, Mariátegui understood the entanglement of non-contemporaneous elements under capital's rule, accompanied by conflicts and forms of struggle never seen before, as part of the processes intensified by the uneven imperialist expansion in both its economic (capital and commodity exports) and non-economic (wars, annexations) roads. One of the outcomes of this process was, in Peru, the so-called 'resurrection' of the indigenous race, which I prefer to call emergent indigeneity.<sup>52</sup> The re-appearance of the colour line under imperialism

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<sup>52</sup> I draw here upon Harris, Carlson and Poata-Smith's definition: "Indigenous identities are emergent; a process of becoming rather than being. Indigenous identities not only develop from the constant ebb and flow of interactions between individuals and others, those interactions are frequently sites of contestation." (2013: 5)

signalled a sort of re-ethnicization of class struggle that, for Mariátegui, was visible all over the non-Western world. Of course, one might add to this that class struggle was already racialized, in Latin America as elsewhere. And this is why the Peruvian Marxist constitutes a key strand of the integration into Marxism of a non-Eurocentric and hence deprovincializing perspective.

### III. The Work of Myth and Memory in Mariátegui's Marxism

'Socialist materialism embraces all possibilities for spiritual, ethical, and philosophical ascent. And we never feel ourselves more fiercely, effectively, and religiously idealistic than when putting our ideas and our feet on the ground.'

José Carlos Mariátegui, *Revista Amauta's* 17th editorial, 1928.

#### 1. Marxism and Irrationalism: Mariátegui and his Readers

In the previous chapter, we saw that 'Peru's Principal Problem' has been widely considered the beginning of *Seven Interpretive Essays*; consequently, the text has been regarded as signaling the initial moment of 'nationalization' of Mariátegui's Marxism. This nationalization, as we have begun to see a *sui generis* one, was characterized not (or not merely) by a project of modernization and assimilation of different cultural vestiges into a single national unity hegemonized by a *mestizo* ideology; rather, it was informed and grounded on the contemporary affinities between modern socialism and the communitarian ways of worlding and worldviews sustained by Indian practices and relations, and it projected on the basis of these affinities the image of an 'Indo American Socialism'.

'Peru's Principal Problem' was written and published in December 1924; a month later, the article 'Man and Myth' appeared in the same journal, *Mundial*, and with it the intellectual bonds of Mariátegui's conceptions with the work of Georges Sorel began to be evident. Indeed, in his later writings (collected in *Defence of Marxism*) Sorel is still acclaimed for being one of the true Marxist revisionists (cf. Mariátegui 2011: 180) alongside none other than Lenin. In my view, to re-read these seemingly paradoxical couplings (namely, Marxism's nationalization vis-à-vis myth and Lenin alongside Sorel) may turn out to be critical to further clarifying the underpinnings of the sort of Marxism elaborated and promoted by the Peruvian thinker.

Such a coupling, nonetheless, has been only partially addressed by *Mariateguista* scholars. The canonical explanation of the place and role that myth

plays in Mariátegui's Marxism has by and large been an instrumental one (as we will see in what follows). The notion appears in such accounts as the compensatory force that fills a gap: the lack of a true, material catalyst for revolutionary subjectivity. The absence of a ripe working class – meaning an ideologically and politically mature social force – remains for such a perspective reason enough to explain the correlation of materialism and irrationalism, in a problematic dyad that stands evidently at odds with a more coherent historical-materialist rationalism. However important the contributions of authors committed to such a view, this reading misses the crucial point of the centrality of cultural and subjective elements in Mariátegui's Marxism, particularly in his understanding of past memories which, in a sort of 'colonial unconscious', have become present-day elements of Peru's class struggle.

This chapter approaches Mariátegui's Marxism in terms of the category of 'myth', and offers a re-reading of Mariátegui's use of this category that connects it to Henri Bergson's ideas about memory and the work of the past in the present. Drawing upon the clarification of the work of myth through the work of memory, the concept of myth will be oriented to further enlighten the Mariátegui-Haya de la Torre debate, with reference to the problem of multiple temporalities, as well as to its epistemological consequences. Finally, I introduce the outline of a Marxism that envisaged the incorporation of non-modern elements into the socialist project, -thus re-considering the mythical and religious motives in their affinity, and potential synchronization, to the world revolution.

#### *Illusion, Imagination and Myth: Mariátegui's Early 1925 Articles*

The first positive engagement of Mariátegui with the notion of myth comes from a set of articles written in early 1925 –namely, 'Two Conceptions of Life', 'Man and Myth', and 'The Final Struggle'. He had nonetheless already advanced some remarks on the relationship between reality and ideals, actuality and imagination, and the like. 'Imagination and Progress', for instance, paid attention to the importance of strong ideals in the maturation of historical forces. In remarks that evoke Hegel's labour of the negative as the determined negation of the actual, Mariátegui asserts that imagination is not an arbitrary irruption within reality, but is

rather deeply dependent on the latter: “just when [imagination] reacts against reality, is when it is more dependent on it. People struggle to change what they see and what they feel, not what they ignore. Hence the only utopias that are valid are those that could be called realistic.” (2011: 400–401) The article goes on to say that “[i]dealists need to rely on the concrete interests of a broad and conscious social stratum. The ideal does not prosper unless it represents a vast interest. [...] When a social class becomes an instrument for its realization.” (2011: 401, trans. modified)

This reconsideration of the role of imagination and ideals in history (which echoes Marx’s early statements on the encounter between classical idealist philosophy and the emerging working class) advances the hypothesis that such ideals must perforce be embodied by social classes –that is, fully embedded in reality– so as to compose ‘realistic utopias’ capable of redirecting reality towards new forms and goals. Though he does not provide a clear definition of any of these terms, the dialectic of imagination and reality takes in Mariátegui’s discourse the form of a mutual transformation: reality offers a ready-made organization of facts and elements; imagination in turn strives –sometimes unsuccessfully, sometimes not– to mould such organization into new forms. Ideals are hence valid precisely to the extent that they demonstrate adequacy to reality not only in its actual form but likewise in its potential tendencies.

In ‘Man and Myth’ Mariátegui further states, in a Nietzschean fashion, that “man, as philosophy defines him, is a metaphysical animal.” (2011: 384) The claim is not so much to get rid of science, but to make the case for its compatibility with metaphysical speculation, a relation denied and obscured by positivism as well as by the dominant Marxist conception of materialism. What for Mariátegui has been undermined by contemporary philosophical currents is not reason *tout court*, but rather its validity as ‘absolute’. The contemporary philosophies accounted here are relativism, pragmatism and vitalism, inasmuch as they played down absolute conceptions on truth; hence “[i]t is useless, according to these theories, to search for an absolute truth. The truth of today is not the truth of tomorrow. A truth is only valid for a period of time. We should be content with a relative truth.” (2011: 385–86) But, as we will see later, this judgment is not a plea for simple relativism; instead, the reference to these philosophical currents was proposing to dig into the interplaying of forms of subjectivity that pertain to different historical levels and

registers. Mariátegui embraces Sorel's argument on the compatibility of mythical images with the prospects of the socialist revolution, an idea famously compressed by the latter in the 'myth of the proletarian general strike'. In this adoption, he identifies the key 'spiritual' difference between bourgeoisie and the working class in the presence or absence of a mythical force, as long as rationalism, liberalism and faith in progress (for Mariátegui, the core of nineteenth century capitalism's myth) seemed abandoned by bourgeois intellectuals in the aftermaths of the First World War: This passage condenses the argument:

What most clearly and obviously differentiates bourgeoisie and proletariat in this era is myth. The bourgeoisie no longer has any myth. It has become incredulous, skeptical, nihilist. [...] The proletariat possesses a myth: social revolution. It moves toward that myth with passionate and active faith. The bourgeoisie denies; the proletariat affirms. The bourgeois intellectuals entertain themselves with a rationalist critique of the method, theory, technique of the revolutionaries. What a misunderstanding! The strength of revolutionaries is not in their science; it is in their faith, in their passion, in their will. It is a religious, mystical, spiritual force. It is the force of myth. [...] Religious motives have been displaced from the heavens to earth. They are not divine; they are human, social. (2011: 387, trans. modified)

The passage continues by making explicit the presence of Bergson in Sorel's conception of the affinities of myths and revolutionary projects: "Bergson has taught us that not only can religion occupy the region of the inner self; revolutionary myths can equally have their place with the same credentials." (2011, 387) In this sentence, an opaque distinction between religion and myth is implicitly suggested (we shall return to this point in section 3.1 of this chapter). Summarizing, 'Man and Myth' assembles elements of Marx's 'Contribution to the Critique of Hegel's Philosophy of Right' (the criticism of heavens turns into the criticism of earth), of Nietzsche's and Bergson's approaches to humanity in metaphysical terms, and of Sorel's myth of the general strike, redefined by Mariátegui in terms of the "myth of social revolution" – all of this addresses an understanding of revolutions as mystical, mythical and passionate mobilizations of a will to act.

'The Final Struggle' continues 'Man and Myth' by means of a relativist position which returns back to the remarks of 'Imagination and Progress': "[r]elativism [...] starts by teaching that reality is an illusion, but it concludes that illusion is, in turn, a reality. It denies that there are absolute truths, but it realizes that people must believe in their relative truth as if they were absolute. [...] Relativistic philosophy proposes, therefore, to obey the law of myth." (2011: 389-90) And this relation of absolute and relative is situated in terms of the dialectic of the concrete and the abstract: "the revolutionary proletariat [...] lives the *reality* of a final struggle. Humanity, meanwhile, from an abstract point of view, lives the *illusion* of a final struggle." (2011, 390 emphasis added) Thus, on the one hand, there is the abstract plane of indeterminateness whereby discrete relative truths succeed one another along history, in a movement for which no 'final struggle' can be asserted. On the other, there is the concrete, experiential plane of certainties that social groups carry, a plane that is built upon determinate struggles against reality as it is actually given. Enlightening this difference, philosophical relativism provides Mariátegui a pathway beyond the deadlock of a reason all-too pleased with a present identical to itself.

#### *On 'Irrationalism' in Latin America*

In these articles from early 1925 Mariátegui did not offer a conceptually balanced definition of myth, metaphysics or religion, nor does he elsewhere. This is arguably the source of those lasting debates on the meaning and function of these notions among *Mariateguista* scholars. The debates on this topic, as on Mariátegui's work as a whole (cf. chapter 1.2 in this work), can be distributed into three phases: the conflict between Marxism and *Aprismo* (and, broadly speaking, national populism); the phase of reaction against Marxist 'orthodoxy' and the rescue of 'heterodox' Marxists in Latin America; and the current phase of 'open Marxism' or of rich and varied 'Marxisms'. In the first phase, *Aprista* intellectuals such as Luis Alberto Sánchez and Eugenio Chang Rodríguez read the presence of mythical and religious elements as the confirmation of Mariátegui's failure to come to terms with a consistent Marxism. Sánchez (n.d: 14) argues that his conversion to Marxism was more verbal than effective, evidence of which is the value that religion –concretely

Catholicism– occupies in his reflections. In a similar vein, Chang Rodríguez (1983: 108) identifies religiosity with Christianity and Catholicism as such, in an argument that presents Mariátegui as forerunner not only of Aprist doctrines as such, but also of Theology of Liberation –at least in the version given to it by Peruvian priest Gustavo Gutiérrez.

On the Marxist side, Adalbert Dessau attempted in 1965 to secularize Mariátegui’s notion of myth. For this author, myth corresponds to what sociologists call ‘models’, collective mental structures that foreshadow a future social order and allow classes and social groups to look beyond the satisfaction of immediate interest. More crucially, the recourse to myth works in his account as a kind of compensation for backwardness, introducing “a historically justifiable metaphysics within conditions that cannot produce a scientific conception of the world.” (Dessau, [1965]1971: 89) The appealing to myth and other concepts borrowed from irrationalism, therefore, is for Dessau a necessary outcome of the material grounds in which Mariátegui’s Marxism is embedded: a non-rational society and culture which prevented both scientific reasoning and the application of the classic works of Marxism-Leninism.

Regarding the second phase of quarrel between orthodoxy and heterodoxies, Robert Paris’s influential reconstruction of Mariátegui’s thought evaluates the presence of myth in similar terms as Dessau: it reveals the absence of “objective sustain of the invoked values, the verification, to say it otherwise, of the near inexistence of the proletariat.” (1981: 143) Paris further specifies that myth functions so as to fill a material gap, the concrete lack of maturity of the industrial workers; in consequence, the legacy of irrationalism becomes an instrumental detour so as to provide Peru’s population with a subversive ground. He concludes that “[m]yth’, the irrational or mystical element, inherited from Sorel or Nietzsche, appears here as the symbol and the instrument of a dialectic that invites to unify the present and its ends and to proclaim this unity, and likewise as the translation of all which can be problematic and indemonstrable for the socialist project in the Peru of the 1920s” (1981: 145) Since the proletariat is regarded as the prototype of a modern, rational subjectivity, myth is conversely considered as an instrument that reveals more about the primacy of pre-modern craft-workers than what may enlighten about the actuality of social revolution in Marxist terms.

Later on, in his contribution to José Aricó's influential collection on Mariátegui, Paris indicated that in his thought "all happens as though from myth to logos or rationality a permanent communication was effected, with neither frontiers nor closed compartments." (1980: 132) Oscar Terán will repeat the point when dealing with the nature of the 'nationalization' of Mariátegui's Marxism: together with saying that "[i]n the very gesture of localizing the *indigenista* object, Mariátegui turned into visibility the problem of nation", he points out the same displacement identified by Paris, albeit in a more nuanced way:

In order to be able to communicate his socialist proposal, he had to totally refuse classist reductionism, for which to each social class there corresponds a defined ideology – being socialism what needs to be naturally the proletariat's outcome. It is precisely there where Mariátegui's analysis notoriously recurs to the Sorelian category of myth, which allows him synthesize an economic, class content with an historical-cultural component. (1986: 117-18)

Terán does not go on to explain the nature of that historical-cultural component; and while his insight leads towards the right direction by pointing out the proximity of myth and nationalization in Mariátegui's Marxism, he shares with Paris the conception of myth as an instrumental conceptual device/*dispositif* whose function rests on filling the gap between the all-too modern imaginary of socialism and the all-too pre-modern reality of *gamonalismo*, economic backwardness, lack of integration, and so forth.

Paris and particularly Terán acknowledge in their respective works the burdens of positivism in the making of Latin American states and institutions during the 19<sup>th</sup> century. In Terán's (1986: 13-14) words, positivism spoke from and for these states, in a foundational and strategic 'alliance' at the basis of the nation-states. In other words, for Terán positivism was a close ally for Latin American dominant classes in both managing internal control of territories and populations and projecting them as 'modern' states. Fabio Moraga stresses in this respect that "liberalism contributed the political bases to the social order, and positivism had a fundamental influence in structuring the knowledge" of such an order. (2002: 180-81) It is thus surprising that these scholars dismiss so quickly Sorelian, Nietzschean

and other philosophical currents as 'irrationalism', without an adequate contextualization of the concrete realms where such ideological battles were waged.

By neglecting the active and progressive role that Nietzscheanism, vitalism and other non-rationalist currents accomplished in the emergence of an oppositional consciousness from within the crisis of the Oligarchic republic, Paris and Terán still seem trapped in the 'positivistic effect' characteristic of a certain version of Marxism. The problem with Paris's and Terán's readings, as we shall see, lies in the fact that they isolate and abstract Mariátegui's notion of myth –along with other 'irrationalist' ideas– from its very operational field, the *Kulturkampf* of Peru and Latin America in the 1920s. Nietzsche was not only read but largely adopted by leftist intellectuals in Europe and Latin America. In Russia, for instance, Anatoli Lunacharsky is presented by Ofelia Schutte (1988: 73) as advancing one of the most coherent perspectives within a sort of 'Nietzschean Marxism'. In Argentina, student-leader Deodoro Roca (1918) put the Nietzschean opposition against Catholicism as 'religion of slaves' at the centre of the 'Liminar Manifesto', the battle-cry text of the Cordoba University reform movement.

Conversely, Nietzsche and other 'irrationalist' philosophical tendencies counted affiliates in Peru as early as 1900. Alejandro Deustúa, a former positivist philosopher and part of the *civilista* intelligentsia, was the first to systematically introduce Henri Bergson both in seminars at the Universidad Nacional Mayor de San Marcos and books on aesthetics.<sup>53</sup> Some of the most important Peruvian intellectuals of the period, such as Francisco García Calderón, Víctor Andrés Belaúnde and Mariano Ibérico, were also part of this Peruvian association with vitalism.

Therefore, philosophical currents characterized by Paris and Terán as 'irrationalism' were indeed important vehicles of the struggle against the positivist and rationalist pillars of Latin America's oligarchic orders. Rather than irrationalism, these philosophies were adopted and adapted in their 'non-rationalist' stance, for they provided elements and ways of reasoning allegedly capable of

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<sup>53</sup> Augusto Salazar Bondy (1965a: 184, 188-9) points out that the most decisive element in Deustúa's reception of Bergson was the intuition of freedom as a way to have access to the sources of being; thereby, from a politically and pedagogically aristocratic standpoint, he was able to overcome positivism without returning to the old speculative metaphysics.

challenging and overcoming the positivist hegemony. These non-rationalist elements did not achieve fixed valences across their adherents; rather, they circulated among diverging intellectual groups and orientations. Whereas Roca and Cuban Marxist Julio Antonio Mella resorted to Nietzsche in order to combat oligarchic institutions inherited from the nineteenth century, there were others who took the vitalist wave up in order to restore an aristocratic and elitist concept of culture. As inspired by José Enrique Rodó's influential *Ariel* (1900), the latter intellectual trend was labelled *arielismo* and counted many important followers in the continent, such as Mexican José Vasconcelos, Argentineans Alfredo Palacios and Manuel Ugarte, Peruvians Francisco García Calderón and Víctor Belaúnde, all of whom were interlocutors of Mariátegui. In this sense, we might suggest that in Latin America there cohabited both an aristocratic and a 'popular' – in the Gramscian sense of 'of the people' – version of Nietzsche. Mariátegui was situated in the latter (cf. Von Vacano, 2004).

#### *Some Conceptual Remarks on Irrationalism and Romanticism*

We must place Mariátegui within what Michael Löwy has labelled 'romantic Marxism'. Understood not as a school but as a counter-cultural movement against modern capitalism, Löwy explains that it corresponds to one of the main contemporary constructs of sensibility, expressed in the project of 're-enchanting the world'. The author has offered elsewhere significant accounts of Marxist intellectuals from the viewpoint of their romantic leanings (cf. Löwy, 1979; 2005a). He highlights that Mariátegui's case has the peculiarity that, in contradistinction to Lukàcs, Gramsci or Benjamin, he continued to employ Sorelian themes even when totally committed to official communism in the 1920s. I argue that Mariátegui's understanding of both myth and the metaphysical nature of human being's owes more to Nietzsche than to Sorel, notwithstanding the fact that the immediate form of the idea was borrowed from the latter.

Nietzsche postulated that human beings are always not-yet determined animals, that is, incomplete species thrown to nature – to 'reality' – as a partially stranger alien to it. This is the source of that mythical instinct peculiar to mankind and which works essentially by images and not concepts. Mariátegui follows

Nietzsche's conflation of metaphysics –speculation on reality and its relation to the spirit- and myth – orientation which 'helps to live' – when he defines it as 'metaphysical animal' and grounds in this definition mankind's deep necessity of myths. Conversely, Nietzsche found in myth means of spiritual regeneration in the midst of the crisis of liberal and positivist precepts. *The Birth of Tragedy*,<sup>54</sup> in particular, offers three different meanings of myth. First, myth is an image or story that connects the temporal flux of appearances to an underlying ontological ground, which in turn is not fully accessible to reason. It is, second, a narrative relating transient human experiences to a purposeful, time-transcending order of reality. Finally, it is an illusory, erroneous or untrue story. (cf. Poellner, 1998: 64–5; Daniels, 2014) I consider that Mariátegui's idea of myth lies between the third –when applied to the old liberal myth- and the first –regarding the emerging revolutionary myth- of these meanings. Myths often include a varied plurality of contents and shapes, something which goes hand in hand to Nietzsche's perspectivism.

As Chiara Bottici (2009) has pointed out, contemporary political philosophy has dismissed myth altogether, thereby reducing political reason and missing myth's particular intervention and function in politics. However, important contemporary research on political myth has corrected this lack. Roland Boer (2009, 11), for instance, argues that political myths are irreducible to the distinction between reason and motivation, stressing the fact that they are unverifiable. They are indemonstrable and undeniable at the same time, since its value rests on the effects they produce on reality. Myth embodies a pragmatic and not an analytical or logical truth. In other words, myths are 'fictitious' in the sense that they do not fully participate in the present-based distinction of true nor false; they are not-yet images of the future that motivate people to act in the present according to such future-images. Myths are 'not-yet' images, and still they are already 'facts' to the extent that they are grounded in people's minds and serve as potential operators to action.

Political myth, accordingly, is defined by Boer as "an alternative language, one that is figurative and metaphorical, one that projects [...] stories of better worlds.

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<sup>54</sup> There is no evidence of Mariátegui's access to Nietzsche's book. However, the influence of this work in Latin American writers was profuse; for instance, as early as 1908 Dominican essayist and literary critique Pedro Henríquez Ureña (very influential in Mariátegui) provided a way-out from positivism with his essay 'Nietzsche and pragmatism', where *The Birth of Tragedy* is read from pragmatist lens (cf. Rojo, ch. II).

In its own figurative way, political myth throws such worlds out from human desires and wishes" (2011: 47). Together with being motivating fictions of future worlds, Boer distinguishes two other general features of political myths: while they open up certain possibilities, they foreclose others in a potentially repressive way; they are, that is, liberating as well as oppressive. The third feature is that they contain a constitutive exception or repression, an element that makes it possible and impossible at the same time, (2009: 22–26) something contained in their polysemic and plural nature. Bottici proposes to understand myth not as a mere composite but as a process, for which she borrows Hans Blumenberg's concept of "the work on myth": a process that is at the same time a *saying* and a *doing*. The work *on* myth, that is, describes a narration (the work *of* myth) as well as a mythologeme or a set of mythologemes (the work *at* myth) in a continuous re-working. This work takes place, finally, in a network of symbols and figurative means, which in turn makes possible the organization of narrative sequences. (2007: 99–113)

These considerations might help understand the relevance of myths for political discourses and movements. I argue that Mariátegui's was a 'popular' reading of Nietzsche, particularly of his conception of metaphysics and of myth. Along the lines of a romantic Marxism, he adopted a critical distance from a rationalist understanding of science in the comprehension of history, class struggle and revolution. The Peruvian Marxist understood the mythical, the mystical and the religious as pertaining to the same dimension of life, the metaphysical realm, as we will see below. In his version of Marxism, enriched by Sorel's and Bergson's ideas, such a dimension worked as the idealist side of materialism.

## **2. The Presence of Sorel and Bergson in Mariátegui's Marxism**

### *Sorel's Marxism: Myth as Anti-Utopianism*

As early as the lessons on the world crisis, Mariátegui (1984, 198–200) refers to Sorel as an important figure who antagonized the *fin de siècle* dominant Lassalleian tendencies within the European socialist movement. There has been wide-ranging discussion of the extent to which the French intellectual can be considered a Marxist

(cf. Horowitz, 1961; Kolakowski, 1978, ch. 7; Lichtheim, 1971 ch. 6; Llorente, 2012; Stanley, 1981). One of the reasons of this ambiguity, to be sure, lies in Sorel's own disregarding of ready-made standards for coherence as well as of restrictive labels.<sup>55</sup> His was, nonetheless, an intellectual endeavour at least partially aligned with some of Marxism's core theses: namely, history as a dynamic led by class struggle; the centrality of the proletariat's moral and intellectual preparation to wage and triumph in such a struggle; and the necessity to wipe out state oppression. What is more, Sorel was a protagonist of important Marxist, socialist and syndicalist debates ever since his commitment to the proletarian cause in 1894-1896 until his death in 1922.

Sorel's challenge to his moment's official version of Marxism pursued the task of socialism's moral reconstruction (Stanley, 1976: 30). This was addressed by means of the idea of 'praxis'. This idea had been rescued from oblivion by the Italian philosopher Antonio Labriola, whose 1896 *Essays on the Materialist Conception of History* was prefaced by Sorel in its 1897 French translation. Labriola emphasizes 'labour' understood as the active and conscious transformation of matter, as the specific human praxis and, in consequence, as the ground of history as science. Modern industry is considered as the model of praxis: "by experiments we become co-workers of nature" (1912: 65), concluding that, by means of modern labour and industrial experimentation, thought has ceased to be a hypothesis and become instead a pivotal productive force, with no a priori limits. Peter Thomas comments in this regard that "Labriola [...] defined the 'philosophy of praxis' as 'the heart and soul of historical materialism. This philosophy is immanent to the things on which it philosophizes. From life to thought, and not from thought to life; this is the realistic process.'" (Thomas 2015: 101) In this sense, Labriola's rescue of praxis restored what Etienne Balibar (2007: 23-7) reminds us is the idealistic side of Marxism, rooted in the positive consideration of the acting subject -Hegel's 'labour of the negative'.<sup>56</sup>

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<sup>55</sup> See to this respect his 'Letter to Daniel Halevy', published as the Introduction of *Reflections on Violence* (1999); also his Introduction to the *Materials for a Theory of the Proletariat* (1976).

<sup>56</sup> Labriola's reading of Marx, while still compromised with some deterministic tenants that characterized the Marxism of the Second International (such as Kautsky's or Plekhanov's), was nevertheless a sort of 'soft' determinism, allowing for some degree of autonomy to the moral and spiritual dimension. For instance, solidarity in work was for him a truly spiritual achievement derived from, but not utterly determined in its consequences

Sorel's political thought, albeit uneven and shifting throughout his lifetime, developed within similar premises. However, he understood the volitional aspect of praxis as corresponding not to thought but to struggle and violence. He considered that the moral preparation of the working class must imply an ongoing preoccupation with violence, to the extent that it actualizes the 'spirit of scission' in which socialism finds its grounds. The idea of proletarian violence, however, is used by Sorel in contradistinction to bourgeois 'force', understood as the coercive organized violence of the rulers. Therefore, labour and violence were the two dimensions of praxis outlined by Sorel, which amounts to say that, in his view, praxis was understood as the psychological and moral preparation for the battle *plus* the technological and organizational improvement of labour.

A matter in which Sorel is at odds with most forms of Marxism, approaching rather to the anarchist tradition, rests on the issue of its involvement in practical politics. In particular, Sorel rejects the possibility to assign pre-defined orientations to myths. In his view, mythical forces are spontaneously creative, hence unpredictable in its consequences and directions.<sup>57</sup> However, he acknowledges that they are malleable by political and social forces and discourses, hence easily mutable into ideologies - that is, into abstract, intellectualized utopias. Sorel's explicit aim was nonetheless to invigorate the Marxist notion of praxis meanwhile confronting the utopian diversions this critical tradition has produced. For, in order to be instrumental for the working class' moral reconstruction, Marxism must confront and surmount what Sorel considers its 'utopian' side. Utopian are those images of social transformation compounded by fixed ends and linear stages in the road toward their achievement. Accordingly, he criticized Marxism's deterministic overtones, especially the image of a world ineluctably driving to socialism - an image used and abused by the Marxist orthodoxy, but which can be certainly found in Marx's and Engels' writings.

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by, capital's organization of labour. This version of Marxism was influential for both Mariátegui (cf. Oshiro, 1996; Massardo, 2001, 16-7) and Gramsci (cf. Haug, 2000).

<sup>57</sup> This aspect was criticized in Gramsci's reflections on the myth of 'modern prince', in an otherwise appreciative approach to Sorel's notion of myth: "In Sorel's case it is clear that behind the spontaneity there lies a purely mechanistic assumption, behind the liberty (will-life-force) a maximum of determinism, *behind the idealism an absolute materialism.*" (2003: 129, emphasis added)

Sorel also considered Marx's theory of value as particularly problematic in this sense, to the extent that surplus-labour as unpaid labour entails a utopian concept of justice: "As society is transformed by Marx into a correlation of masters and servants, we can say that the first part [of labour, considered as a general activity of society and divided up into costs and profit] is paid labour while the second is unpaid labour; but these obscure formulas are equivocal and should be banished from science." (1976: 153)<sup>58</sup> Renzo Llorente thus appropriately describes Sorel's thought as "a fairly coherent, if idiosyncratic, variety of *anarcho-Marxism*." (2012: 79)

The anti-utopian concept proposed for Marxism is the 'myth of the proletarian strike'. Myth is defined as the construction of a future undetermined in time, formed by images that bring and activate, by intuition, dispositions already virtually present to wage the class war in order to bring it to a veritable end –for the cause, in the mythical composite, is "certain to triumph" (Sorel, 1999: 20). *Reflections on Violence* explains that these constructions can possess great effectiveness in the socialist struggle: "a body of images capable of evoking instinctively all the sentiments which correspond to the different manifestations of the war undertaken by socialism against modern society." (1999: 118) This composite is defined as "expressions of a will to act" oriented to an unforeseeable future. Therefore, the true content of Marx's doctrine rests in Sorel's view on his revelation of a catastrophic revolutionary exit from capitalist exploitation and moral subjugation, and not on the utopian projection of a peaceful transition from it towards socialism.

In a Nietzschean fashion, intuition, sentiment and instinct form in Sorel's discourse a bloc of ideas that, given its metaphorical composition, prevents its reduction to a rationalist 'analysis' or critical refutation: "[a] myth cannot be refuted, since it is, at bottom, identical with the convictions of a group, being the expression of these convictions in the language of movement; and it is, in consequence, unanalysable into parts which could be placed on the plane of historical descriptions." (1999: 29) Bottici, in turn, argues that Sorel himself discusses the myth

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<sup>58</sup> In this matter, Sorel shared Benedetto Croce's consideration of the theory of value as a 'logic' (and not an 'actual') fact; in this view, surplus-value would be not a real but a logic, intellectual construct, hence smuggling an abstract and utopian ideal of justice. Cf. Croce (1915: 50-9).

of the general strike, particularly against the criticism it aroused from parliamentary socialists. (2007: 162) In other words, despite Sorel's rejection of the possibility to analyze and discuss myth, he opens the path for doing so. Be this as it may, for Sorel to comprehend a social force such as the proletariat means to understand not only its economic nature and composition, but also its psychology or 'spirit', that is, the moral conceptions and images which it expresses – or, in other words, the metaphysical dimension of social life, in which science and reason play little part.<sup>59</sup>

Mariátegui understood Sorel's contribution to Marxism in terms of a much-needed emphasis on the moral contingency in history. What is missed in Paris's and Terán's accounts is the fact that, for Mariátegui, 'myth' is as an actual component of the 'superstructures', that is to say, the 'expression' of a socioeconomic infrastructure, an expression which in turn reacts and gives a certain dynamic to its 'base'. As Walter Benjamin put it, by referring to the "doctrine of the ideological superstructure" in his *Arcades Project*, "[t]he superstructure is the expression of the infrastructure. The economic conditions under which society exists are expressed in the superstructure –precisely as, with the sleeper, an overfull stomach finds not its reflection but its expression in the content of dreams, which, from a causal point of view, it may be said to 'condition'." (1999, 392) I consider that Mariátegui held a similar, non-deterministic understanding of the 'expression' of socioeconomic factors by superstructural manifestations, and that he consequently situated myth within such a framework.

Two recent *Mariateguista* scholars have approached to the subject of myth from a more refreshing and thought-provoking perspective. Miguel Mazzeo (2009, 86ff.), on the one hand, reads Mariátegui's myth as a constitutive part of the ontological reality of human beings. By appealing to myth – Mazzeo continues – Mariátegui did not perform an instrumental shortcut, but rather he gave account of a part of reality with the potential to liberate revolutionary energies. This theoretical

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<sup>59</sup> Sorel agreed with Henri Bergson and William James that modern science is of little help in the comprehension of religion, belief or myth. These authors shared the widespread *fin-de-siècle* negative attitude towards the increasing rationalization of life and thought, derived from processes such as the mechanization of work, the bureaucratization of civil life, and the concomitant epistemological hegemony of positivism –all of which was regarded as amounting to the impoverishment of 'experience'. 'True experience', conversely, was a matter of speculation, desire and no scant anxiety in this context (cf. Jay, 2004, particularly ch. 7 and 8).

sensibility was also apparent in his long-lasting commitment to and continuous monitoring of contemporary experimentations or innovations in the artistic terrain, first and foremost avant-garde movements (particularly the surrealism in Europe and *indigenismo* in Peru as well as other Latin American countries such as Mexico) as well as in trans-cultural artistic phenomena such as the cinema of Charles Chaplin (cf. Kraniauskas, 2004: 370-75). On the other hand, Jorge Oshiro (2013: 285-86) considers Mariátegui's myth as the conceptual operating mediator of the dialectic between a revolutionary elite-vanguard and the 'multitude' or 'masses', in a fashion similar to Gramsci's myth of modern prince (i.e. revolutionary party). Both sides are indispensable in revolutionary endeavours, since the latter provides the former with a mystical environment and mythical contents, which in turn make that vanguard act according to these contents and forms.

Mazzeo and Oshiro are no doubt closer to Mariátegui in this respect than Dessau, Paris and Terán, to the extent that they recognize the productivity that the metaphysical realm has in his version of Marxism. However, while Oshiro's account, if not implausible, in my view overestimates the influence of Spinoza in detriment of Bergson, Mazzeo seems simply to assume the continuity of the ideas of 'elements of practical socialism' and 'myth of social revolution' – that is, he takes for granted the actual existence of mythical elements potentially oriented to socialism among indigenous communities. What in my view is missing in these accounts is a closer consideration of Bergson's role in the formation of Mariátegui's Marxism.

*The Work of the Past into the Present: Bergson (and Benjamin) on Memory and Myth*

In drawing upon Bergson, Mariátegui displayed a remarkable interest in the speculative grounds of social praxis. Sorel himself had asked whether "it might not be desirable to study this theory of myths more thoroughly, utilizing the enlightenment we owe to the Bergsonian philosophy." (1999: 46) Bergson's thought was actually proclaimed and spread from the pages of the Italian journal *Il Divenire Sociale* and its French counterpart *Le Mouvement Socialiste* as a strong antagonist to positivism and social Darwinism. In so doing, the 'new socialism' which emerged from a 'syndicalist' generation at odds with the determinism of the 2nd

International found in Bergson's philosophy a fellow-traveller in the journey to overcome the metaphysical edifice of official Marxism.

By means of the concept of duration (*durée*) Bergson proposed to redefine standard notions of space, time, and causality. Duration is defined by the French philosopher as the prolongation or preservation of the past into the present –as the intuitive perception of a thing being identical to itself through the flux of time comes to show. The problem with the mechanistic and mathematical conception of time comes from its definition as a geometrical and extensive continuum, divisible at will, which amounts to reducing time to another dimension of space. Bergson explains that geometrical extension is the nature of space, not of time. The currency of illegitimate translations from the extended into the unextended leads Bergson to propose the notion of 'pure duration':

Pure duration is the form which the succession of our conscious states assumes when our ego lets itself *live*, when it refrains from separating its present state from its former states. For this purpose it need not be entirely absorbed in the passing sensation or idea; for then, on the contrary, it would no longer *endure*. Nor need it forget its former states: it is enough that, in recalling these states, it does not set them alongside its actual state as one point alongside another, but forms both the past and the present states into an organic whole ([1888]2001: 100).

In *Matter and Memory* Bergson attempted to transcend the psychological leanings of *Time and Free Will* in order to bring his argument to an ontological level; hence the first section ('Perception') discusses the reification of brain as well as the common understanding of consciousness as grounded on body-operations. Contending against Kantian philosophies, Bergson argues that perception is not oriented to knowledge but to action; accordingly, both body and brain are centres of action rather than as receivers of information. The disposition to act is in turn explained as directly proportional to the degree of 'affection' a body is subjected to. Therefore, perception is defined in terms of the measure of our possible actions upon bodies and vice versa, so that "[t]he greater the body's power of action, the wider is the field that perception embraces." ([1896]1991: 56–57) Matter, in turn, is defined as an aggregate of images, and by images Bergson means "a certain existence which is

more than that which the idealist calls a *representation*, but less than that which the realist calls a *thing*, an existence placed half-way between the 'thing' and the 'representation.'" (1991: vii-viii) This is arguably a non-substantial conception of matter, which certainly affords a consideration of the work of perception in the very modulation –and not only in the knowledge– of the material,

*Matter and Memory* distinguishes in turn between two different kinds of memory. On the one hand, there is habit, the quasi-automatic replaying and repeating of past actions and behaviours so as to react according to present demands. There is memory involved here but as a mere utilitarian deposit. On the other, there is 'true memory' made up by registers of a past represented as such in the form of 'image-remembrances'. In Bergson's words, memory works as follows: it "imports the past into the present, contracts into a single intuition many moments of duration, and thus by a twofold operation compels us, de facto, to perceive matter in ourselves, whereas we, de jure, perceive matter within matter." (1991: 80) Memory enables therefore to contract, into a single intuition, multiple moments of time, multiple durations. It is important to notice that, in Bergson's account, the memory-past is *in its entirety always 'there'*, that is, 'here', as virtual existence which *coexists* with the present: "the whole of our past psychical life conditions our present state, without being its necessary determinant." (1991: 148) Only by habituation or familiarization – passive memory, that is – we accustom to select some parts of the past, sometimes so automatically that it seems that the reaction to the stimuli pertains to the body, to matter itself.

More specifically, memory works for Bergson in a twofold way: by recollection-translation and by rotation-orientation:

Memory, laden with the whole of the past, responds to the appeal of the present state by two simultaneous movements, one of *translation*, by which it moves in its entirety to meet experience, thus *contracting* more or less, though without dividing, with a view to action; the other of *rotation* upon itself, by which it *turns toward* the situation of the moment, presenting to it that side of itself which may prove to be the most useful. (1991: 168–69)

For a work of memory to be activated, it is necessary to relax the inhibitory powers of the body so as to allow the recollection of those memory-images coming out of relaxation. The translational character of this process means, in Deleuze terms, the “coalescence” (1988: 65) of the past with the present, coming from the fact that a present-demand needs to be situated at a certain level of the past in order to be properly acknowledged back into the present. Rotation, on the other hand, is the process of selection of the portion of the past that best suits to the present demand for action. It serves, as Deleuze explains, to present the union of past and present in its useful facet, which means the provision of a pathway from the past events in order to solve present tasks.

Memory needs therefore to be actualized to become real; but it conserves its virtual existence at all times. The complete actualization of memory-recollection occurs when a memory has become an ‘image’. As the body (and matter as such) was already defined as an assemblage of images, the becoming-image of a memory means for Bergson that it has become embodied: “when the recollection thus brought down is capable of blending so well with the present perception that we cannot say where perception ends or where memory begins. At that precise moment, memory, instead of capriciously sending in and calling back its images, follows regularly, in all their details, the movements of the body.” (1991: 106) The ontological status that the past achieves in Bergson’s philosophy is summarized by Deleuze:

[W]hile the past coexists with its own present, and while it coexists with itself on various levels of contraction, we must recognize that the present itself is only the most contracted level of the past. (1988: 74)

The coalescence of past and present, and the reason why present-perceptions need to dig into the past through the work of memory, lies in the fact that *the past has not ceased to exist*. Whenever it is not actualized, that is, contracted as a memory-image, is because it has ceased to be useful (cf. Bergson, 1991: 193) Nonetheless, this does not mean that it cannot recover this capacity again in the future. Memory-images, those entities half-way between things and representations, must be addressed from this perspective as materialization or actualization of memory insofar as the latter is

bound to a perception and hence provided with an actual, action-oriented embodiment.

*A 'Benjaminian' Marxism in Latin America?*

Borrowing Menninghaus's (2013: 28–31) reading of Benjamin's notion of myth, I consider that Mariátegui oriented his Marxism along similar lines, that is, in an exercise of translation of the discoveries on the unconscious from the individual into the collective. However difficult this translation may be, and regardless of the rudimentary status that the conception of collective memory – or of dream – achieved in these authors, the fact is that they shared the preoccupation about the historical significance of collective mythical images. In Benjamin's case, myth confronts the quasi-theological dignity with which rationalism awarded truth and logos, although the romantic underpinnings of the notion were supplied by the Enlightenment motive of the 'destruction of myth'. Stathis Gourgouris asserts in this regard that "Benjamin's investment is dialectical through and through: myth is destroyed by means of the myth; myth is rescued by means of its destruction." (2006: 224)

Andrew McGettigan has argued that Benjamin's metaphysical commitments can be traced upon Bergson's *Matter and Memory* and the role of the past into the present. As the German thinker understood it, the energies of revolution come from particular, repressed past-times which return, as 'images', under particular conditions of collective, historical experience (2009: 26; cf. *Supra*, Introduction, fn8) Accordingly, McGettigan reads Benjamin's dialectical image as "the involuntary memory of redeemed humanity" (2009: 31). In Benjamin's words, "while the relation of the present to the past is a purely temporal, continuous one, the relation of what-has-been to the now is dialectical: is not progression but image, suddenly emergent. Only dialectical images are genuine images (that is, not archaic); and the place where one encounters them is language." (1999: 462) The crucial aspect of Benjamin's quote here is, of course, the non-archaic (that is, coeval) status of 'genuine' images coming out of the dialectical relation of the past with the now. McGettigan concludes that the German thinker adapted Bergson's topology so as to come to terms with the work of memory, an adaption expressed in his consideration

of the messianic 'irruption' as the interruption provoked by a specific conjuncture of charged past time and the present. By means of Bergson, finally, it is possible to re-evaluate Benjamin's anti-evolutionist philosophical attitude, as expressed for instance in Konvolute N2 of *The Arcades Project* regarding historical materialism: "its founding concept is not progress but actualization." (1999: 460)

Of course, favourable approaches to Bergson were not the rule among Marxists during the first half of the twentieth century. Max Horkheimer (2005), for instance, criticized the conception of *durée* (and, by extension, the whole of his metaphysical apparatus) because of its estrangement from 'actual' history. Duration, Horkheimer argued, remains a merely contemplative, interior account of time, incapable of come to terms with the social realm, that is, with human praxis. This evaluation comes to undermine the translational attempts from consciousness and the individual into the socio-historical dimension. Meanwhile, in Latin America and unlike Mariátegui, Argentinean Marxist Aníbal Ponce displayed a strong negative view towards those philosophical currents that questioned reason and science. Commenting on the Nobel Prize received by the French philosopher in 1927, Ponce stated that "no most favourable moment for a philosophy of so seductive intimacy than the final third of the last century, when it begun to take shape -in more and more solid contours - a vigorous reaction against triumphant democracy and the flourishing sciences". In the praises for the instinctive, he found nothing but "an excuse for not to think" (1983b: 84-85)

These considerations indeed evoke what is perhaps the strongest and best-known Marxist criticism of irrationalism in general, and of vitalism in particular: *The Destruction of Reason*. In it, Lukàcs explains that Bergson's concept of *intuition* "was projected outwards as a tendency to destroy the objectivity and truth of natural scientific knowledge; and it was directed inwards as the introspection of an isolated parasitic individual divorced from the life of society during the imperialist period." (1980: 24-25) This account was grounded on an utterly negative judgment of irrationalism as an intellectual phenomenon pertaining to the hegemony of monopoly capital and hence akin to fascism: "the possibility of a fascist, aggressively reactionary ideology is objectively contained in every philosophical stirring of irrationalism." (1980: 32)

At the antipodes of Lukàcs, Horkheimer and Ponce, in Mariátegui's Marxism the ideas of Bergson and Sorel important vehicles to come to terms with the affinities between mythical elements present in social life and the awakening of revolutionary forces. In my hypothesis, Bergson's metaphysics lies in the background of Mariátegui's understanding of the interplay of past and present –in historical terms, of archaic elements or 'traditions', on the one hand, and modernity, on the other. And whereas Sorel instilled in him the myth of the general strike, through Bergson the Peruvian Marxist was able to elaborate a more definite model of the work of myth: the work of memory. One might say that while Sorel's idea of praxis reduced the idealistic side of Marxism to the 'spirit of scission' captured within the myth of proletarian strike, Mariátegui located the idealism in Marxism within a broader concept-image of myth that, coupled with religion and faith –the 'metaphysical dimension' that is– served as a means to approach the communitarian traditions and worldviews apparent in Indian ways of worlding. What is important to bear in mind is that Bergson's work of memory helped clarify Mariátegui's understanding of the work of myth as the image-projection of the past into the present.

### **3. Thinking the Hetero-Temporal: the Mariátegui-Haya Debate Revisited**

#### *Myth, Religion, and Tradition in Mariátegui's Marxism*

In Mariátegui's discourse, myth is usually conflated with religion and faith. The metaphysical realm constitutes, in this sense, a crucial dimension not to be abolished as Marx and Engels envisaged, but rather vitalized in and for the revolutionary process. Concretely, Mariátegui explained the dismissal of the founding fathers of Marxism towards myth and religion as the rather necessary outcome of a thought that emerged in capital's 'classical era', that is, at the height of the bourgeois order. This amounted to a widespread faith in progress, reason and science, an ideology in which Marx could not but partake, at least partially. Yet Marxism –Mariátegui thought– cannot be reduced to this aspect (as we will see in reference to *Defence of Marxism*). It is only in a romantic era, or in the era of twilight of the capitalist order – an epoch of crisis as well as awakening of other historical

motivations – that the scope of Marxism can be re-evaluated in more-than-rationalist terms.

In this regard, it is important to evaluate the fifth section of the *Essays*, entitled *El Factor Religioso* ('The Religious Factor'). This essay provides crucial indications to comprehend the aspect of religion that Mariátegui sought to incorporate into Marxism. From the essay's title, it is evident that the religious dimension is considered as a social 'factor' – and not an epiphenomenal 'fact' – of Peru's social formation. This perspective, however, needed an explanation: "the concept of religion has become broader and deeper, going far beyond a church and a sacrament." (1974: 124) Some further remarks are provided at the end of the essay. First, Mariátegui says that "[s]ocialism, according to the conclusions of historical materialism, considers that ecclesiastic forms and religious doctrines are produced and sustained by the socio-economic structure. Therefore, it is concerned with changing the latter and not the former." And further, closing the essay, it is asserted that nineteenth-century rationalism

sought to explain religion in terms of philosophy. More realistically, pragmatism has accorded to religion the place from which rationalism conceitedly thought to dislodge it. As Sorel predicted, the historical experience of recent years has proven that present revolutionary myths can occupy man's conscience just as fully as the old religious myths. (1974: 151-52)

The tandem of historical materialism and Bergson's based Sorelian pragmatism<sup>60</sup> is therefore oriented to comprehend the religious factor. More concretely, Bergson's intuition – the internal and emphatic understanding of life incorporated by Sorel's notion of social myths – is mobilized towards historical explanation so as to come to terms with the continuities of 'old religious myths' and 'present revolutionary myths'. But Mariátegui observes that to do so, the term 'religion' needs to be relieved of its assimilation to institutional forms (church and sacraments). And this is arguably the main feature of the essay: in it, Mariátegui establishes a permanent contrast between the popular religiosity characteristic of Indian ways of worlding

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<sup>60</sup> This matching of Bergson and North-American pragmatism was addressed by Sorel in *L'utilite du pragmatism* (1976, ch. 8). An account on the similarities and differences between Bergson and William James can be found in H. Kallen (1914) and K. Ferguson (2006).

and worldviews, on the one hand, and those institutional- or state-forms within which the former have been framed and subjected –however partially–, on the other. The essay establishes the distinction of popular and institutional religiosity in the three main epochs of so-called Peru. During the pre-colonial period, Inka religion was marked by “its collective theocracy and its materialism”. Drawing on J. G. Frazer’s *The Golden Bough*, Mariátegui distinguishes religions based on a metaphysical communion of soul and God, from those characterized instead by a public moral function, inscribing the Inka theocracy among the latter: “it had temporal rather than spiritual ends and cared more about the kingdom of earth than the kingdom of heaven” (1974: 127). Therefore,

[t]he religion of Tawantinsuyo [...] did not violate any of the feelings or customs of the Indians. [...] All its roots were nourished on the instincts and customs of a nation made up of agrarian tribes that had a healthy, rural pantheism and that were more inclined to cooperate than to wage war. [...] Therefore, the natural elements of the religion of the ancient Peruvians – animism, magic, totems, and tabus – are more interesting to investigate than the mysteries and symbols of their metaphysics and very rudimentary mythology. (1974: 127–28)

“The Inka people” – Mariátegui concludes this section of the essay – “knew no separation between religion and politics” (1974: 130). This assertion is significant for it holds in a nutshell Mariátegui’s own conception of the affinities of politics and religion, as he himself explained in his comment on Miguel de Unamuno (cf. Mariátegui, 1977: 120; see also Löwy, 2008: 72–74). The Spanish conquest, however, initiated a new period in this relation, one in which the alliance of religious and politics was instrumental in the subalternization of the Indians: “[t]he Catholic religion was superimposed on indigenous rites, only partially absorbing them.” (1974: 125). Grounded in large-landowning and the *encomienda* system, the colonial rule appears as a new theocracy. Religious colonization is explained by Mariátegui’s (1974: 135) more as the instillation of a system of worship rather than a new ‘faith’, an ecclesiastic more than a truly religious endeavour. The Indians’ seeming lack of resistance to this process is explained by Mariátegui in terms of the flexibility that the Catholic Church displayed regarding their ceremonies, rituals and images, in contradistinction to the intransigence showed in the doctrinaire and theological

order. Finally, the Republican period behaved in religion as in economics and politics: with the continuation of Catholic policies by the new state, it exhibited its blatant absence of liberalism.

'The Religious Factor', fifth in the *Essays*' definitive order, was the last part of the book to be written. Its publication – in *Mundial*, as usual – began in September of 1927 and went on until January of 1928 in eight installments. Mariátegui published in the same journal two articles that preceded these reflections (namely, 'Heterodoxies of the Tradition' and 'The National Tradition') and that are in my view pivotal in this reconstruction. 'Heterodoxies of the Tradition' opens with prospect of a "revolutionary thesis of the tradition" (1986, 161) which serves as a contestation of the notion of tradition as a fixed and 'already-past' past. The revolutionary thesis addressed by Mariátegui indicates that "[t]radition [...] is characterized precisely by its resistance to be apprehended in a hermetic formula. As the result of a series of experiences –that is, of successive transformations of reality under the action of an ideal, which overcomes it consulting it and moulds it obeying it– tradition is heterogeneous and contradictory in its components." (1986: 163) Tradition, this thesis declares, is 'contradictory' and hence alive and mobile, not a petrified fact of the past. Accordingly, for Mariátegui there is no contradiction between revolutionaries and tradition; there is, however, between revolutionaries and traditionalists.

A week later, 'The National Tradition' expands such a thesis asserting first that "outside tradition, there is nothing but utopia." (1986: 169) The idea of utopia does not hold a univocally negative meaning in Mariátegui's work; however, this assertion seems to follow Sorel in the dismissal of the utopian from the standpoint of historical transformation. Peru's revolutionaries, Mariátegui affirms accordingly, dig into a farther-reaching tradition than traditionalist accounts (molded on Spain and Rome) in order to achieve the real contents of the national project. Through Indian memories, these contents have access to a deeper timescale into the past. The end of the article comes to reinforce the image of a heterogeneous and mobile tradition: "When we are spoken of the national tradition, we need to previously establish what tradition we are dealing with, for we have a threefold tradition." (1986: 170)

What Mariátegui denominates as the living, mobile and heterogeneous tradition is in my view tied to Bergson's idea of the past – of memory, that is – as virtual multiplicity which is nonetheless contemporaneous to the present now. Like memory, tradition is the result of 'experiences' which are considered by Mariátegui as social and historical. These experiences are defined in terms of the dialectical interplay of ideal and reality, in a process that becomes impressed upon the social body and remains there, so to speak, furnishing the collective unconscious. Thereby embodied, memories or traditions cannot be erased – "*Indietro non si torna*", Mariátegui (Ibid.) states in Italian. Yet it is precisely the cumulative series of socially-embodied experiences which assigns the national formation a difficult task. These experiences are the traces of the would-be nation's metamorphoses – traumatic metamorphoses, to be sure – and as such they constitute the elements of a motley, heterogeneous tradition. This way of thinking seems to me to be akin to Gramsci's arguments about popular and subaltern cultures as fragmentary and dispersed; and like the Italian communist, the Peruvian socialist understood revolutionary practice as the organization of such heterogeneous popular substratum.

I find it apposite to read Mariátegui's account of popular tradition, communitarian religiosity, and the work of memory-myth from a Benjaminian position. The task of the materialist historian, as Benjamin understood it, is to read history against the grain of the victors' narrative, which in Mariátegui's case meant against the oligarchic ideology whose pillar is a mixture of Catholicism and positivism. Furthermore, the Indian communitarian traditions, the memories of defeated past generations embodied in the myth of Pachakutec, come into view as a virtual motivator for revolutionary, socialist activity. Peter Osborne argues that, for Benjamin, historical materialism is the doctrine of which communism is the tradition (2000: 68). At a more practical or intuitive –i.e. pre-conceptual– way, Mariátegui proposed to read Peru's communist traditions embodied in the practices of the still-alive *ayllu* and projected back to the myth of agrarian communism from the framework of present-day tasks of historical materialism –the actuality of revolution.

To point out the affinities between agrarian and modern communism, however, does not amount to conflating them in a trans-historical fashion, for "[t]he

two communisms are products of different human experiences. They belong to different historical epochs”, and therefore “[a]ll that can be compared is their essential and material likeness, within the essential and material difference of time and space.” (1974: 74) Under a Marxist framework, the force-ideas of communitarian tradition, popular religiosity, and memory-myth are offered so as to indicate the possibility of creating a new Peruvianness which includes and is based on Indian ways of worlding and worldviews. In doing so, Mariátegui envisaged an ecumenical, trans-cultural socialism deeply rooted in the oppressed cultural memories and aimed to their ‘redemption’. Historical materialism, in his view, provides the sort of relativism that makes possible to comprehend both the likeness and differences derived from the despair coevalness of the archaic and the modern. Now, what Mariátegui meant by ‘historical relativism’ needs to be reviewed so as to differentiate both his socialist programme as well as his adoption of Marxism from Haya de la Torre’s. The latter, in fact, famously justified the necessity of a vernacular theoretical perspective based on Latin America’s singularities (an *Aprista doctrine*, that is) by the recourse to Einstein’s ‘spatio-temporal relativity’.

The Mariátegui–Haya de la Torre debate was characterized in Chapter II in terms of their divergent perspectives on uneven and combined development, imperialism and historical evolution. This debate, I argued, was motivated by political differences and reached a rather sociological level. In the next section, I will present the debate from a more epistemological viewpoint.

#### *The Spatio-Temporal Relativity for Indo-American exception*

Haya’s challenge to Marxism was based upon a consideration of the divergent nature of Indo-American historical trajectory as compared to Europe’s, and hence of the incommensurability of the former with the latter’s ideas of progress and evolution. During the 1920s, his initial approach to communist politics sustained a discourse somewhat internal to Marxist and communist debates. However, from 1927 onwards, on the basis of political differences made explicit in that year’s Anti-Imperialist League meeting held in Brussels, he started to consider Marxism as another Eurocentric conception of the world, later defining the task as that of ‘dialectically overcoming’ Marxism. The linchpins of this task were, first, the

appropriation of a notion of dialectics derived from Hegel and Engels,<sup>61</sup> and second, its association to Einstein's theory of relativity. In *Anti Imperialism and the APRA*, such an overcoming is defined as the "dialectic negation of Marxism in its deterministic form", a conceptual movement performed through the "philosophical projection" of Einstein's relativity onto the historical realm (1977b: 55-56).

Translated into historical sciences, Einstein's theory would produce the dialectical negation and overcoming of Marxism inasmuch as it challenges and supersedes Euclidean and Newtonian conceptions of matter. The transformation of the concept of matter – Haya goes on – amounts to a thoroughly reconceptualization of gravity, space and time, so that "if such a revolution embraces the concept of matter itself" we are before a "*revolutionary conception of philosophical materialism*, that is to say, before a new system of relations between thought and matter" (1977: 119). What has been challenged is the static and motionless notion of matter which Marxism's determinism derives from. In doing so, Haya introduces relativity theory into Indo-American political ideology.

Among liberation theories –Haya states– Marxism proved to be a useful step forward thanks to the prominence given to class struggle. The awakening of non-European peoples, however (marked in Latin America by the Mexican revolution) has made evident Marxism's pitfalls in terms of its roots into European experiences and viewpoints. Dismissing Marxism as a doctrine capable of enlightening the conditions of social struggle in Latin America, hence of politically contributing to the continent's social transformation, the APRA doctrine is presented as the "methodical confrontation" of the Marxist thesis from the standpoint of "Indo-American reality" (1977b: 148). Relativity theory introduces the observer's point of

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<sup>61</sup> It is worth quoting at length Haya's definition of the dialectical method: "Philosophically, *Aprismo* departs from Marx's determinism and the Hegelian dialectic adopted by his worldview. Inspired by Hegel's principle: [d]ialectics is the compelling force by means of which nothing is firmly maintained; it is the progressive determination inherent to thought, as well as the outcome and negation of it (*Logik*); and, in Engels' more specific definition: dialectics is nothing but the science of the general laws of movement, and of the evolution of human society and of thought (*Anti-Duhring*), *Aprismo* funds itself in the philosophical methodologization [*metodización*], in the dialectical statement of the negation of the negation. [...] it also recognizes Marxism as a philosophical school subjected to this very law discovered and developed by it. [...] From this viewpoint, historical determinism is not a law enforced on every latitude." (1977b, 19) Haya's definition of dialectics owes more to Lassalle than to Marx. Conversely, as we will see in next section, Mariátegui held a marked anti-Lassallean Marxism, which is coherent with his adoption of Lenin's and Sorel's Marxisms.

view into account, which in Haya's view amounts to asserting that what in Europe the 'last' instance of capitalism, in Indo-America becomes the 'first': "[t]here is here, among many, two viewpoints, two angles, two different and relatively parallel planes; hence the laws and propositions conceived for a certain historical space-time does not correspond to the other" (1977b: 26).

The multiple and relative spatial-temporal trajectories are approached by Haya in terms of the integration of the geographical setting, the "objective field", and "subjective time", which is the product of the conceptions made by peoples within such a space. The objective field is the historical space that determines (in the Marxist sense of the 'determination in the last instance') subjective time. The interplay of these dimensions gives birth to a singular rhythm or "objective time", which thus becomes an individual "historical space-time" (1977b: 23). In turn, the development of the productive forces and techniques is defined as the material content of historical space-times: "the degrees of 'historic time' are measured by the steps of peoples in the evolution of their development of the mastery over nature" (1977b: 25) The development of productive forces determines the civilization stages of peoples and their historical space-time, so that one can only speak on retardation or backwardness "in relation to the rhythm of evolution marked by the conditions of life and work of the most developed peoples" (1977b: 24).

Therefore, what Aprista ideology conserves from Marxism is this precise deterministic explanation of development by the forces of production, technologically and instrumentally considered. Such a deterministic element, in turn, is complemented with the relativistic principle carried out to its extreme "[w]hat is important to establish and always bear in mind is that historical time is not chronological time [...] and that [...] *it is non-transferable from space to space.*" (1977b: 41, emphasis added) Imperialism, as it was already seen in Chapter I, corresponds to this sort of illegitimate transference of civilization stages, an 'arrhythmia' disrupting the otherwise Indo-American normal historical space-time, hence negatively determining the developmental path of this region. This is what is implied in the following sentence: "When social phenomena are 'logically' produced, there is no artifice in History; but when the observation is 'imported' this is diverted, and hence the historical view turns out to be 'illogical' and the political procedure becomes *immoral...*" (1977b: 89, original emphasis) Of course, not only

imperialism but also Marxism pertains to this sort of observation imported or transferred from different geographies –the former being the actual process through which what in Europe is the last stage of capitalism (product of successive development stages) turns out to be the exportation and colonization of “incipient economies” (1977b: 89; see also Castro-Arenas, 1979: 56).

Fredrick Pike (1986: 86ff) has reconstructed Haya’s conceptions not only from their sources in Einstein, Spengler and Toynbee (explicit in his texts) but also in Count Hermann Keyserling, a German mystic-philosopher who achieved a certain influence among some Latin American intellectual circles in the inter-Wars period. Keyserling – Pike says – explained that the contemporary world suffers from the tensions provoked by the clash of different historical rhythms: that is the source of its decadence. Only the emergence of a world-rhythm will restore the integrative power characteristic of ancient civilizations and lost in modern times. This restored world-rhythm will imply the return of the human kind to mystical and spiritual values, all of which would foster the recovery of lost harmony as achieved in less-materialist epochs, but only insofar as the nations are able to integrate into higher, more synchronized unities.

The self-consciousness of this harmonization process signals the awakening of what Haya called “continent-people”, that is, the ability of peoples to turn their quantitative, material experience (which arguably means their technical development) into qualitative ‘spiritual’ aptitude. In a bizarre but telling passage, Haya defines continent-people as “the coordination of space- and time-history, determined by the conscience of a people that, before the demand of world equilibrium, aims further to an expansion – another topic pointed out by *Relativism* – compelling us to situate our own gravitational field within determinate historical limits [...] This peculiar *Relativism* applies to Modern States.” (1977b: 86, original emphasis) This baroque justification for a larger, expanded Latin American state is coherent with Haya’s outlined alternative trajectory of Indo-America *within* a capitalist world eventually undermined in its imperialist tendencies. In this post-imperialist world, a progressive harmonization of the world market – conducted and supported by strong anti-imperialist states across the colonial and semi-colonial world – will readdress these ‘continent-peoples’ into more suitable, balanced forms to transit through capitalism. As we can see more clearly now, imperialism is

considered by Haya as an 'arrhythmia' distorting the individuality of Indo-American timeline, which does not put into question the necessity of capitalism, but instead signals its future by means of a (cultural?) relativistic – but, at the end of the day, deeply deterministic – detour.

*A Necessary 'Defense' of Marxism*

The initial indictments of the *Aprista* doctrine were contemporaneous with the final instalments and publication of *Seven Interpretive Essays* (the first version of Haya's *Anti Imperialism and the APRA* appeared in the same year, 1928). It is no surprise then that Mariátegui attempted to contest these formulations immediately: the article 'The Revisionist Attempt of *Beyond Marxism*' –the first article of Mariátegui's *Defense of Marxism* in order of composition, the second in the final arrangement– appeared in July 1928 in *Mundial*. In it, the explicit target was the Belgian socialist Henri de Man's 1926 *Zur Psychologie des Sozialismus*, translated into French in 1927 with the title it will come to be known by: *Au-delà du Marxisme* or *Beyond Marxism*. This book soon achieved a great popularity among heterodox Marxists and non-Marxists alike,<sup>62</sup> and its foremost claim was the 'liquidation' of Marxism. As we will see, however, one might read Mariátegui's *Defence* as implicitly oriented to Haya de la Torre and his alternative doctrine.

The Belgian scholar and socialist politician (some years later allied to the Nazi invasion and finally judged and executed after the 1945 liberation for the same reasons) claimed in his book that a movement of 'spiritualization' of socialist theory was needed, so as to contribute to the regeneration of the socialist movement. His endeavour was therefore grounded in what he called a 'theory of motives' able to confront Marxism's 'psychological rationalism' and hence to come to terms with passions and irrational human behaviours. Accordingly, the author indicated what in his view corresponds to the methodological failure of Marxism: monocausal economic determinism, expressed in the conceptual divorce between 'interests' and 'ideas' as well as in the consideration of capitalism's inability to overcome its own economic contradictions. By means of elements borrowed from social as well as

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<sup>62</sup> Count Keyserling, for instance, considered it the most important Marxist book since *Capital*. Cf. P. Dodge (1966: 68).

physiological psychology, De Man identified what he considered to be the kernel of Marxism's pitfalls amounting to the inevitability of the socialist overthrow of capitalism (cf. Dodge, 1966: 72, 75–83).

Mariátegui explicitly formulated his reflections on De Man's and similar endeavours such as Emilio Vanderverde's or Max Eastman's. I argue, however, that such a settling of accounts with this sort of Marxist revisionism held Haya de la Torre as its implicit target.<sup>63</sup> De Man's work appears as a symptom of sorts of the doctrinal crisis within socialist theory, and although *Beyond Marxism* was aimed at confronting and correcting the course of the European workers' movement, Mariátegui envisaged the worldwide scope of such an effort, which compromised historical materialism *tout court* – and of which the *Aprista* doctrine itself was an example (cf. Fernández, 2010: 176).

At a methodological level, Mariátegui accuses De Man of eclectically (mis)translating elements of psychology and ethical philosophy into class struggle – which can also be said of Haya's extrapolation of the relativity theory into history. But the epistemological challenge remains: Is there a form of truth in subjectivity that fatally compromises Marxism as both theory and practice? A positive answer to this question had been launched by a renewed revisionism emerging from within the socialist movement in the aftermath of the First World War, the Russian revolution, and the defeat of other revolutionary upheavals between 1919 and 1921. Mariátegui, in turn, chooses to briefly outline the history of Marxism's revisionism in order to shift the coordinates for approaching these debates. He proposes the pair of 'dogma' and 'heresy' – a theological polarity – as an alternative approach to the more common one of orthodoxy and revisionism/heterodoxy. "Dogma" – Mariátegui says – "is here understood as a doctrine of historical change. And as such, while change happens, it is so only while dogma is not filed away in the archive or becomes an ideological law of the past; there is nothing like dogma to guarantee creative liberty, the germinal function of thought." (2011: 179)

Heresies, on the other hand, are productive only to the extent that they are oriented to internally contributing to the expansion and invigoration of a dogmatic

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<sup>63</sup> Not less important, Osvaldo Fernández (2010: 182–83) indicates that *Defence* was motivated in part by Mariátegui's settling of account with his own previous political consciousness.

body: “the fortune of a heresy depends on its elements or its possibilities to become dogma or to be incorporated into a dogma” (1976: 125); otherwise, they remain individual, fruitless endeavours. Mariátegui declares in consequence that the ‘true revision’ of Marxism, “in the sense of the *renovation and continuation* of the work of Marx” (2011: 189, emphasis added), has been accomplished by intellectuals with motivations quite different than De Man’s, coupling here Sorel and Lenin. Sorel represents –Mariátegui goes on– the return to an active, dynamic and heroic conception of socialism “and its insertion in the new intellectual, organic reality” – namely, imperialism. Through Sorel, conversely, “Marxism assimilates the substantial elements and acquisitions of philosophic currents after Marx” (2011: 190). Therefore, the rectification of the tension between Marxism and revisionism by means of that between dogma and heresy allows Mariátegui to give an account of what he considers a twofold open path for the contemporary vitalization of historical materialism: the theory of imperialism and the theory of myths informed by Bergson’s reflections on memory and the metaphysical dimension of life.

In these remarks, Mariátegui throws back at De Man what the latter had presented as Marxism’s incomprehension of contemporary philosophical achievements, particularly in psychology and ethics: “it would be more appropriate to accuse the latter [contemporary philosophy] of a deliberate and fearful incomprehension of the class struggle and socialism.” (2011: 197) There is here an implicit definition of historical materialism as historical because of its ability to incorporate scientific and philosophical advances into its own revolutionary horizon –‘spirit’ and the metaphysical dimension included. To assert this, however, requires a sharp differentiation from the sort of ethics, such as those derived from De Man, based on the criticism of a politics (that of the German Social Democracy) of Lassallean more than Marxist bent (cf. 1976: 20). The conclusions drawn by Mariátegui from this distinction outlined a renewed understanding of the ‘ethical function’ of socialism: “The ethical function of socialism [...] should be sought not in grandiloquent Decalogues, nor in philosophical speculations that by no means constitute a necessity in Marxist theorizations, but in the creation of a producers’ morality for the very process of anticapitalist struggle.” (2011: 201) Elaborating more on this, he asserts that

the proletariat must elevate itself to a 'producers' morality', quite distant and distinct from the 'slave morality' that its gratuitous teachers of morality, horrified by its materialism, officiously attempt to provide it. [...] The proletariat only enters history politically, as a social class, at the moment it discovers its mission to build a superior social order with elements gathered by human effort [...] And it has not gained this ability miraculously. It has won it by situating itself solidly on the terrain of the economy, of production. Its class morale depends on the energy and heroism with which operates on this terrain [...] (2011: 212-13)

This class morality will depend thus on the ability to master production, that is, on the capacity to revolutionize its own material ground – on the capacity, in other words, to turn a socialized-but-still-capitalist economy into a socialized-and-socialist form of production. However, there is an active role for consciousness in the leap or 'elevation' to a producers' morality. As Labriola recognized, the formation of a sentiment of co-belonging – class solidarity – determine what Marxism has understood as the passage from class-in-itself to class-for-itself. Such a passage is accomplished, however, in a mythical form – and that is the content Mariátegui considers so important to Marxism's philosophical 'updating': "The theory of revolutionary myths, which applies to the socialist movement the experience of religious movements, establishes the ground of a philosophy of revolution deeply impregnated with psychological and sociological realism." (2011: 196) Historical materialism, on the other hand, is not hindered from making this philosophical updating; to believe so it is, for Mariátegui, to confuse historical and philosophical materialism. In a decisive passage, Mariátegui summarizes the point:

Historical materialism is precisely not a metaphysical or philosophical materialism, nor is it a philosophy of history left behind by scientific progress. Marx had no reason to create anything more than a method of historical interpretation of modern society. [...] Marxist criticism studies capitalist society concretely. As long as capitalism has been transformed definitively, Marx's canon remains valid. Socialism or, rather, the struggle to transform the social order from capitalist to collectivist, keeps this critique alive, continues it, confirms it, corrects it. *Any attempt*

*to categorize it as a simple scientific theory is in vain since it works in history as the gospel and method of a mass movement.* (2011: 194, emphasis added)

Marxism is thus defined as fundamentally a method of historical interpretation, whose ideas are nonetheless “radically different from the mutable fortune of scientific and philosophical ideas that accompany or immediately precede them in time” (2011: 195). The surprising element that emerges from Mariátegui’s words is, of course, the consideration of Marxism as ‘gospel and method’. The question arises: What does it make Marxism not ‘just’ a scientific method for interpreting capitalism, but also a gospel of the masses? What is the ‘dogmatic’ core of Marxism that becomes invigorated by the productive heresies that update it to the new philosophical and scientific horizons? Let us recall here the 1852 letter to Joseph Weydemeyer in which Marx made the following clarification:

[N]o credit is due to me for discovering the existence of classes in modern society or the struggle between them. [...] What I did that was new was to prove: 1) that the *existence of classes* is only bound up with *particular historical phases in the development of production*, 2) that the class struggle necessarily leads to the dictatorship of the proletariat, 3) that this dictatorship itself only constitutes the transition to the *abolition of all classes* and to a *classless society*. (2010a: 62–5)

If we read this assertion from the viewpoint of myth, the Marxist method-become-gospel can be considered as the transformation of its own discoveries – namely, the historicization of class struggle – into the myth of social revolution. For Mariátegui, despite Marx and Engels’s own debts to nineteenth-century rationalism, the myth of social revolution is totally derived from the historicization of modern society and class struggle made possible by the work of the founding fathers of historical materialism. The Marxist ‘dogma’ – the dialectics of a method becoming myth, that is– assumes the form of an explanation that ‘reveals’ its own solution with the force of a historical necessity. This is also Gramsci’s definition of the mythical in his account of Machiavelli and Sorel (cf. Gramsci, 2003: 130). In Mariátegui’s Marxism, ‘myth’ is not opposed but intimately engaged with science, to the extent that the former brings scientific truths to a higher level, that of being actual motivators for historical action. The dialectics of myth and science suggested in the description of

Marxism as a method-become-gospel works like those 'ideals' embodied in social classes described in the late-1924 article 'Imagination and Progress'.

Mariátegui thus reconciles Sorel and Lenin by reading the latter back from the 'revisionist' moment of Marxism, a moment in which Sorel's heresy was instrumental and "indispensable to the confirmation of dogma's health." (1976: 20). Lenin, theoretician of imperialism and leader of the Russian revolution, is explained in terms of the urgency to 'spiritualize' Marxism under premises quite different than the 'ethical socialism' proposed by De Man. What is required, in Mariátegui's view, is a more attentive consideration of the complexity and multidimensionality of the revolutionary phenomenon, spiritual factors included. The dominant event of the recent history of socialism is, without doubt, the Russian revolution: "[i]t is to this accomplishment, whose historical reach cannot yet be measured, that one must go in order to find a new stage of Marxism." (2011: 190, transl. modified) Marxism must thus be read back from the standpoint of this contemporary event, which marks its positive, creative actualization; conversely, only this sort of historical events give full meaning to their own previous history. De Man's endeavour, at the end of the day, can be fairly considered an internal criticism of reformist socialism; but precisely because of its own reformist commitments, the revisionist attempt remains blind –or, better, 'resistant', in the Freudian use of the term– to the actuality of revolution.

#### *Coloniality on Trial*

'Literature on Trial' is the concluding and more extensive of Mariátegui's *Seven Interpretive Essays*. Following the above line of reasoning, I will argue that in this text we can find an example of Mariátegui's 'work of myth'. This account will be pursued following the previous framework and putting it in dialogue with Neil Larsen's important comments on the essay. The passages we will review here are part of the final versions of Mariátegui's intervention in the 'polemic over *indigenismo*', so we should link this argument with the previous chapter's section. The essay presents a balance-sheet of Peruvian letters, seeking to indict the *civilista*

version of Peru's literary history.<sup>64</sup> It is the very existence of a literary national tradition that is denied and unveiled as ideological by means of Mariátegui's 'examination of evidences'. But before (and in another instance of his kinship with Gramsci) he draws upon Francesco de Sanctis's ruminations on the conceptual status of "national literatures" in *Teoria e storia della letteratura*, in order to assert that "[t]he nation itself is an abstraction, an allegory, a myth that does not correspond to a reality that can be scientifically defined." (1974: 188) What is more, the inorganic development of the entity called 'Peru', expressed in the historical extra-social status of the Indian, is brought to the front as the material basis to evaluate the likewise inorganic character of the literature produced therein.

Tracing the coordinates of his endeavour, Mariátegui points out that "[l]anguage is the raw material that unites literature." By reason of its colonial history as well as "[t]he Quechua-Spanish dualism in Peru, still unresolved" (1974: 184, 188), Peruvian letters require to be distinguished from those cases of organic literature such as the French, Italian or Spanish: it prevents our national literature from being studied with the methods used for literatures that were created and developed without the intervention of a conquest." Peruvian literature, therefore, cannot be studied from within the framework of classicism, romanticism and modernism as a temporal continuum; In what is considered as the most significant contribution made in this essay (cf. D'Allemand, 1994; see also Melis, 2007), Mariátegui offers a method ("literary, not sociological") by means of which a post-colonial country can be examined; this method distinguishes between "three periods: colonial, cosmopolitan, national. In the first period, the country, in a literary sense, is a colony dependent on its metropolis. In the second period, it simultaneously assimilates elements of various foreign literatures. In the third period, it shapes and expresses its own personality and feelings." (1974: 191) In this sense, Mariátegui questions the assumption of an already defined national literature. In Riva Agüero, the exclusive emphasis on Spanish-based currents implies both a neglect of Inka oral literature as well as an insufficient consideration

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<sup>64</sup> The central accused in this 'trial' is José de la Riva Agüero, Peruvian historian, literary critic and politician, whose 1905 *Character of the Literature of Independent Peru* was the first modern attempt to give an account of the literary history of the 'nation'.

of the contemporary currents striving to revitalize the field by introducing an *indigenista* element.

Riva Agüero, among others, considered *indigenismo* as an exotic, Western-mirroring avant-garde, something that is re-evaluated by Mariátegui as the concrete adoption of the cosmopolitan in the making of the national character. *Indigenismo* appears in this account as the literary current heralding the coming national period.<sup>65</sup> The proto-national grounds of this otherwise 'exotic' literary tendency are placed in the social rather than the literary dimension. In other words, what is crucial in this critical consideration is its commitment with the Indian social struggle and not so much its achievements in the representation of an 'indigenous' literature. In a crucial passage, the essay points out that "[i]ndigenista literature cannot give us a strictly authentic version of the Indian, for it must idealize and stylize him. Not it can give us his soul. It is still a *mestizo* literature and as such is called *indigenista* and not indigenous. If an indigenous literature finally appears, it will be when the Indians themselves are able to produce it." (1974: 274)

This passage has been acutely commented upon by Neil Larsen. The *indigenista* literature, portrayed as an 'untrue' version of the Indian insofar as it makes use of artificial (i.e., avant-garde) techniques and resources, is approached nonetheless as an historical necessity, a prelude to self-representation. Self-representation, or *indigenous* (*indígena*, and not *indigenista*) literature, will arrive when the Indians unfold all their social potentials. For Larsen, Mariátegui shows himself here to be at odds with the more accustomed idea of progression from 'content' to its self-accomplished 'form' – in Hegel, for instance. On the contrary, Peru's 'national' literature, like its nationhood itself, has developed by 'mere' forms, either in the form of *civilista* Peruvianness, or in the 'artificial', untrue representation of the nation provided by *indigenismo*. These forms correspond respectively to the colonial and cosmopolitan periods, all of which indicates for Larsen the project of creation of a proper 'true' content, a direct and reliable Indian self-representation "as it were, *ex nihilo*" (2001: 88–9).

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<sup>65</sup> César Vallejo's first book *Los Heraldos Negros* is highlighted in Mariátegui's account, for it "ushers in the dawn of a new poetry in Peru. [...] In Vallejo, for the first time in our history, indigenous sentiment is given pristine expression." (1974: 250)

From this perspective, Larsen points out rightly that Mariátegui's paradox lies in the tension between cultural nationalism ("fallacy of essentialism") and postcolonialism ("fallacy of textualism") in the explanation of the nation – in other words, the consideration of the nation as an immediate content versus the nation as an illusion, a mere narrative (2001: 87). Yet Mariátegui has already defined nation as myth, an unscientific reality. Larsen concludes that "those very same socio-historical conditions that have render the allegorical, abstract myth of the nation transparent to the anti-colonial intellectual are, for Mariátegui, conditions that demand an act of faith in the national myth itself." (2001: 87, 90) What Larsen seems nonetheless to miss is precisely the politics of myth engaged in Mariátegui's political imaginary. It is, in my account, first a politics grounded in those "spiritual elements of labour" conceptualized by Sorel (1974: 283fn, trans. modified; cf. Mariátegui, 1965b: 345fn) and carried out by communitarian practices; and not in 'forms' imposed in a top-down fashion, such as the still-colonial Republic or Leguía's project of Peru's Westernization. As we already seen in Chapter I, for Mariátegui in post-colonial countries both the national and the socialist projects are transformed by the imperialist conjuncture, a transformation which entails the intersection of national and socialist projects. (cf. Mariátegui 1986: 100; and chapter I of this work) In this sense, the evoked 'national' myth is only capable of being achieved through the intermingling of socialism and anti-colonialism.

Second, and more significant for the current argument, the resort to the mythical –as Larsen indicates– is oriented to filling the historical gap between 'form' and 'content'. However, this is not merely because of its (formal) affinities with "a tribal culture" (Larsen, 2001: 91), but rather by the connections established between these cultural elements and their own past memories. The Indian life, Mariátegui highlights, conserves an individual and recognizable 'style' (arguably, the basis of the projected *indigenous* literature) despite its history of oppression; this style, in turn, rests on the continuity of its past: "[i]t is evident that he [the Indian] is still not incorporated into the expanding, dynamic civilization that seeks to be universal. *Yet he has not broken with his past.* His historical process is at standstill, paralyzed, however he has not lost individuality because of this." (1965b: 345, emphasis added). The colonial unconscious working behind Andean communitarian traditions (the myth of Pachakuteq, that is) appears thus as the kernel of the

national-cum-socialist project of Peruvian re-foundation. However, this will occur only on the condition that these mythical memories are brought over their potential synchronicity to the myth of social revolution.

There is a complex interplay of temporalities at stake in the consideration of the function that the 'myth of nation' plays in a country typified by a colonial and post- (but as-yet semi-) colonial history. The coexistence of communitarian elements of production characteristic of uneven capitalist development brings to the forefront a conserved Indian religiosity characterized as collective and materialist –that is, with earthly and not other-worldly orientations. From capital's viewpoint, these memories and practices are backward, already-past elements remaining out-of-sync with modernity. *Indigenista* literature, in turn, comes to envisage –in an 'artificial', avant-garde and hence still cosmopolitan fashion– the potential actualization of these memories. Itself another 'form', the commitments of this literature to the Indian social struggle for liberation nonetheless projects the potential synchronicity of the autochthonous and the modern in a mythical image. "[A]n autochthonous society can rapidly find its own way to modern civilization and translate into its own tongue the lessons of the West", Mariátegui (1974: 283) asserts regarding the feasibility of this synchronization.

The work of myth, in other (Bergsonian) terms, functions as the work of memory in the actualization of a virtual reality by means of its recollection/translation; one may say it is an 'avant-garde' recollection that meets past experiences, and 'socialist' rotation/translation situating the former in its usefulness for the present. Mariátegui's politics of myth, consequently, achieves its form neither by a trans-historical essence of the nation nor by the mere efficacy of a fictional narrative, but through the affinities between a (autochthonous) virtual reality and an actual (socialist) historical movement. In other words, the politics of myth is comprehended as the politics of the united front in Mariátegui's programme, a programme of remaking the nation that is outlined in a communist *and* communitarian (not state-based, that is) perspective. In doing so, Mariátegui's 'subaltern' standpoint envisages and helps to disclose the heterogeneous temporalities involved Peru's (and, by extension, Latin America's) participation of the actuality of world revolution.

#### 4. Conclusions: Hetero-Temporality and Indo-American Socialism

The mythical entanglement of Pachakutec and socialist revolution envisaged the affinities between those subversive ethno-cultural elements and the prospect of a worldwide classless society. Adumbrating the synchronization of motives which pertain to different temporalities, the indigenous standpoint achieved by Mariátegui's Marxism presaged something of a century before what Álvaro García Linera (2009, Introduction; cf. Kraniauskas, 2015) called socialism as a renewed, universalized *ayllu*. This is what, in my view, is expressed in Mariátegui's projected image of Indo-American socialism:

Socialism is certainly not an Indo-American doctrine. But [...] although socialism, like capitalism, may have been born in Europe, it is not specifically or particularly European. [...] Indo-America can and should have individuality and style in this new world order, but not its own culture or a singular fate. [...] Socialism, finally, is in the American tradition. The most advanced primitive communist organization that history records is that of the Inkas.

We certainly do not want socialism in Latin America to be a copy or imitation. It should be a heroic creation. We have to give birth to Indo American socialism with our own reality, in our own language. (2011: 129-30)

It seems to me that all the elements of Mariátegui's political imaginary are present in this 1928 editorial of *Revista Amauta's* 17<sup>th</sup> issue, where the break with Haya de la Torre was made public. It is, first, the critique of the relativistic 'multiplicity' of continent-peoples and 'rhythms', a geographical-cultural relativism, the standpoint upon which the epistemological incommensurability of Latin America vis-à-vis Western theories and politics was based. The becoming-ecumenical of the socialist idea, premised by the world capitalist integration characteristic of the imperialist age, affords an understanding of temporalities that are neither homogeneous or homogenizable nor simply 'multiple', different or alternative. Rather, they are violently turned into synchronization by the critical tendencies of capitalism in its worldwide expansion. Combining Bergson's philosophy with an understanding of

capitalism as a temporal entanglement, one might say that the acknowledgment of the virtual multiplicity of temporalities does not imply a simple arithmetical difference of individual 'times', but rather a diversity in degree – not in kind – of what is otherwise the unity of duration. Translated into the socio-historical dimension, 'duration' is considered by Mariátegui as the continuous, rebellious presence of communitarian, collectivist relations in the midst of the actual now, as well as a tendency internal to capitalism, disclosed in the expanded socialization of production.

It is beyond the scope of this work to give account of the Mariátegui-Haya debate in terms of the discussion between Bergson and Einstein. It is not clear, moreover, whether Mariátegui had access to this discussion, and to what extent – i.e. first- or second-hand readings. However, the methodological remarks made in *Defence of Marxism* – the alleged autonomy of scientific methods – could be considered to this regard in the following terms: Einstein's relativity theory requires the absolute independence of the systems of reference, a fact that is missed in all of Haya's 'philosophical projection' upon the socio-historical dimension. In Bergson's terms, the validity of this sort of translation depends in the last instance on an appropriate redefinition of matter, so as to distinguish in a more accurate way objects which differ in kind from those which merely differ in degree. For only two objects that differ solely in degree and not in kind could be appropriately considered through a similar scientific method. What from this perspective is invalid in Haya's (and De Man's) account is precisely the conception of the metaphysical dimension of matter – the durational unity of the real. And that is precisely, in my hypothesis, what Mariátegui finds in Bergson's metaphysics so capable of reinvigorating philosophical disquisitions *within* historical materialism.

By unleashing its own constitutive crisis, imperialism (that is, monopoly capital's division of the world economy across the colour-line *cum* an expanded socialization in production) generates in Mariátegui's view the material conditions for the synchronization of these spatially and temporally divergent memories of struggle within the actuality of world revolution. In this sense, political synchronization signals the horizon in which the united front comes to terms with the hetero-temporal condition of capitalist modernity in a non-Western-centred perspective. The unevenness-in-combination of capitalist development is translated

into Bergson's language of creative evolution so as to envisage a revolutionary conception of tradition, in which the Andean communitarian ways of worlding and worldviews could perform a distinctive role within the socialist revolution. In doing so, the partially-repressed Andean memories striving to survive in ethno-cultural practices and worldviews – what one might risk to call a 'colonial unconscious' – are brought to the fore in their mythical forms, in order to make sense of the "consanguinity of the *indigenista* movement with the world revolutionary current" (1963: 11). This consanguinity demands in turn a consideration of socialism in its more-than-scientific dimension, that is, as the modern myth as well: "The strength of revolutionaries is not in their science; it is in their faith, in their passion, in their will. It is a religious, mystical, spiritual force. It is the force of myth" (2011: 387), Mariátegui observed in one of his later writings.

If my reconstruction of Mariátegui's Marxism is correct, he found (perhaps 'intuitively') a pathway to deal with what Bloch regarded as a much-needed multilevel dialectics: a dialectics in which the non-synchronous – the 'archaic' elements – are reintegrated into the 'modern' synchronic dialectics of class struggle from a materialist viewpoint. Drawing on Bergson's understanding of the work of the past in the present, Mariátegui did not offer a systematic account of his perspective – but he did arguably pursue this theoretical horizon from a coherent, essentially political-practical orientation. Barely a 'philosopher', more acquainted with the alchemy of politics and of cultural organization, Mariátegui provided a translation – which was at the same time a stream of actualization – of Marxism from and for Indo-America. What emerged through this 'intuitive' multilevel dialectics are those 'elements of practical socialism', a ground of rich and plural ethno-cultural elements populating the Andean memories of struggle under mythical forms; a ground upon which historical materialism may be invigorated in both its historical and materialist dimensions.

As the above account has attempted to demonstrate, Mariátegui stands as the forerunner of a subalternist perspective in Latin American Marxism in two interwoven senses. On the one hand, he sustained a conception of communist politics deeply rooted in communitarian, popular and subaltern grounds, and not in ideal state-forms. In this sense, he opposed *mestizaje* or miscegenation ideologies as well as separatist national projects. As a grassroots, creative process, communism

must perforce be ecumenical so as to shelter and embrace the heterogeneous, uneven and combined forms of anti-capitalist – and potentially (virtually) socialist – emancipation struggles. On the other hand, he found in Bergson's philosophy of memory and duration the topological model for the work of myth. By means of this non-rationalist but *intuitive* perspective, he disclosed a pathway to deal with the contemporaneous nature of non-contemporaneous memories and structures of temporalization – with the hetero-temporal condition of capitalist modernity and its present-now. In doing so, Mariátegui projected Marxism as the trans-cultural space of engagements through which the virtual synchronicity of the myths of Pachakutec and socialism makes the room for the indigenous participation in the actuality of revolution; as John Kraniauskas (2012: 52) has elegantly put it, Mariátegui found a pathway to Indianize the proletarian, post-capitalist world.

#### IV. The Dependency Hypothesis: *Dependentista* School as Theoretical Moment in Latin American Marxism

'Depending on the level of analysis, more abstract or more concrete, the emphasis displaces either to the form in which general laws are actualised through [*a través de la*] class struggle, or to the form in which class struggle acts upon these laws' actualization.'

Ruy Mauro Marini, *Dialectic of the Dependence*, 1973

Fernando H. Cardoso presented in 1977 a sort of balance-sheet about the reception of 'dependency theory' in developed countries. By means of the article 'The Consumption of Dependency Theory in the United States', he separated waters from other well-known *dependentista* authors. Cardoso used the idea of 'consumption' to refer to such reception, described as the over-simplification of a complex set of debates and arguments into a ready-made theoretical 'article for consumption'. Thus constructed, the reigning version of dependency theory also reflected the triumph of one particular account of *dependentismo*; the others – included his own formulation – have been overlooked by this consumable product. However, Cardoso prevented, "dependency cannot be consumed as a 'theory', implying a corpus of formal and testable propositions"; in doing so, one would run the risk of forming a straw man easily digestible so as to gain academic currency, but also to be destroyed readily (1977: 15). Cardoso's cautions about the construct being consumed under the label of 'dependency theory' or dependency thought introduced the question of the theoretical status achieved by the group of categories, analyses and hypotheses forged under such an umbrella.

Most of the best-known surveys on this intellectual current have pointed out the difficulties in attempts to present 'theory of dependency' in a single label, if such a label comes to imply a systematic and coherent set of principles, concepts and hypotheses.<sup>66</sup> On the contrary, references to the dependency school encompass a

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<sup>66</sup> For well-informed surveys on 'dependency theory', see G. Palma (1978); J. Larraín (1989, ch. 4 and 5); R. Packenham (1992); F. Beigel (2010); and C. Kay (2010, ch. 6).

heterogeneous variety of approaches and conceptual elaborations that gave life to intense debates and polemics. In turn, this heterogeneity went beyond the boundaries of the social sciences, also reaching governmental decision-making offices and strategic debates in political parties and organizations. Hence, the label of dependency embraces a political as well as theoretical and methodological versatility. In this chapter, what I have chosen to term the 'dependency hypothesis' will be considered not as a 'theory' but rather as a 'theoretical moment', that is, an eventful intellectual moment in the history of Marxism in Latin America. This moment comprised useful concepts and crucial insights and arguments, but also carried out misleading formulations and came to end prisoner of its own conceptual 'dependencies'.

I ought to circumscribe the scope of this critical account, since it is clearly impossible to embrace every aspect of this lively debate in a single chapter. I will concentrate my argument on the concept of 'dependence', insofar as it contains the heart-core of the debate at both its conceptual and political dimensions. In doing so, this survey will leave less room to otherwise important authors such as Aníbal Pinto, Celso Furtado, Florestan Fernandes, or Osvaldo Sunkel. In one way or another, all of them participated in and fuelled the *dependentista* debate; nevertheless, as far as they do not focus on the *concept* of dependence, their contributions will be considered here as secondary. In this sense, and based on a pertinent selection criteria, my argument will revolve, first, around the formulations given to the concept of dependency, and second on its relations with development. I will refer therefore to the works of Raul Prebisch, Andre Gunder Frank, Fernando H. Cardoso, Enzo Faletto, Ruy Mauro Marini, and Theotonio Dos Santos, and to a lesser extent, Vania Bambirra, Franz Hinkelammert, and Enrique Dussel.

### **1. Antecedents and Development of the 'School of Santiago'**

The VI Conference of the Comintern, held in 1928, was an event famous by two reasons that concern us here. On the one hand, it was the moment when the ultra-leftist strategic line of 'class against class' was sanctioned, after having been in circulation since 1925 within communist circles. This radicalization, known as the Third International's 'third period' and which lasted until 1935, was partially

occasioned by the failure of the alliance between the Chinese Communist Party with the Kuomintang, the national-popular party of that country. The Shanghai massacre – that is, the violent purge of April 1927, in which the Kuomintang suppressed its Communist counterpart – led the communist officers to re-evaluate the united front strategy pursued early in the 1920s. Added to this, the diagnoses about a coming capitalist crisis of catastrophic proportions stimulated an orientation to boost a ‘classist’ offensive against both right-wing parties and rising fascism, on the one hand, and reformist sectors of the working class, on the other; the latter, (socialist and social-democratic parties and fractions of the working movement) will be widely called ‘social-fascists’ in these days. This new orientation was accompanied by the ‘proletarianization’ of the communist parties, in a process that amounted to an increasing incorporation of working class sectors into the political apparatus as well as to a more active participation in trade unions and other organizations of the working class.

On the other hand, the VI Congress was also the first time when this declared internationalist organization addressed Latin America as a specific terrain of struggles, beyond the homogeneizing reference to the ‘colonial and semi-colonial’ world. The increasing participation of delegates from this region was certainly important to this acknowledgment; moreover, the relatively secure control that Moscow held over many of them was likely of further help.<sup>67</sup> Not without irony, some authors have called it the Comintern’s ‘discovery of America’ (cf. Caballero, 1978, Ch. 4). Thus, in continuity with the strategic turnaround, the meeting resolved that in Latin America communists must actively participate of revolutionary mass-movements directed against the landlord regime and against imperialism, so as to secure their place in the leadership of the proletariat. The ultra-leftist strategic line was also parallel to the process of internal purges that gave Stalin complete control over the Russian party and most of its ‘satellites’; it lasted until the 1935 VII, final Congress of the International, when the strategy of popular and anti-fascist fronts (which will endure until the dissolution of the organism in 1943) was sanctioned.

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<sup>67</sup> For references to the creation of the Comintern’s Latin American Buro, see Chapter X of this work; see also Caballero (1978) and Gómez (1986). For the Argentinean case, see the Introduction to Aguirre ed. (2013).

The foreseen catastrophic crisis came up indeed, starting in the New York stock market in 1929; the 'great depression' rapidly engulfed the entire capitalist world. Such a world economic crisis had a massive impact on Latin American countries. As a consequence, the prospect of a long-lasting depression, accompanied with the partial closures of North-Atlantic markets and aggravated by internal social upheavals and pressures, eventually propelled local bourgeoisies to try to gain national control over these economies by means of fostering economic industrialisation. An important element that gave momentum to these processes was the emergence of 'middle classes' as a political actor. These groups had by and large been incorporated into political participation during the years prior to the bursary crack. In some countries, they formed political parties with national and popular discourses and platforms: that was the case of Mexican *Partido Nacional Revolucionario* (PNR, National Revolutionary Party, the direct precedent of the current PRI) and Peruvian APRA, among others. Early-populist leaders such as Chile's Alessandri or Argentina's Yrigoyen had already opened the doors of political participation for middle-classes and other urban sectors.

By 1934, many of the economies of the region begun the creation or strengthening of national industrial sectors, allegedly the most secure road to development. President Getulio Vargas in Brasil as early as 1930, and then Lázaro Cárdenas in Mexico in 1934, Pedro Aguirre Cerda in Chile in 1938, Rómulo Betancourt in Venezuela in 1945, and Juan Domingo Perón in Argentina in 1946, promoted national industrialization, agrarian reform, and invigoration of the internal market. Consequently, during the late 1940s and the 1950s development through industrialization was established in state agendas, and the perspective of *desarrollismo* (developmentalism) reached primacy as a conception of development. *Desarrollismo's* main recommendation was the 'import-substitution industrialization', popularly known as ISI model. It was a strategy oriented to the substitution of imported goods, their gradual replacement by internal production, and the consequent invigoration of internal markets in order to build a proper capitalist economy. In its main outlines, it contemplated a first phase of substitution of essential, non-durable goods; next, stages envisaged the replication of the procedure for intermediate (durable) and capital goods. The ISI model had its main

intellectual pillar in the UN's Economic Commission for Latin America and the Caribbean ECLAC (CEPAL, by its Spanish acronym).

*Cepalino thought: Development, Structuralism, and World Economy*

In 1948 the UN Assembly created the ECLAC and gave it headquarters in Santiago de Chile. The aim of this organism was to contribute to economic development in the region through the combination of high-standard analysis and strategic provision of intellectual and technical advice to Latin American governments. Mainly composed by economists of Keynesian leanings (cf. Grigera, 2015), the most important inputs for the analysis and evaluation of ISI's developmental 'model' or 'style' (two terms broadly used in the literature of the time) came from ECLAC. Argentinean economist Raul Prebisch was appointed in 1950 as its executive director. He had submitted in 1947 the text 'The Economic Development in Latin America and its Principal Problems'. In a context of post-war emergence of popular struggles for decolonization in the Third-world, Prebisch's theses commenced to be officially adopted into Latin American public policy in a short time.

Considered as the 'ECLAC's manifesto', Prebisch's text portrays an international capitalist system composed of centres and peripheries, in which the former are 'developed', that is, with a large industrial sector based on technological innovation, while the latter remain 'undeveloped', with minimal or no industrial sector. From this perspective, central countries could build integrated economies with a balanced, organized participation of the labour force. Conversely, peripheral nations face 'dual economies', largely heterogeneous due to the parallel existence of pre-capitalist sectors of low productivity, on the one hand, and of incipient industrial sectors, on the other. Prebisch popularized the idea of "deterioration in the terms of trade" (1969: 18), stressing the fact that, in the long term, the same volume of exports allowed peripheral countries to import less and less industrial goods. Prebisch supported his hypothesis with statistics and data in order to demonstrate that, in the long term, the international tendency for industrial prices is to increase, and for raw materials and foodstuffs to decrease. Therefore, international trade is a factor of not just perpetuation, but constant aggravation, for

Latin American economies.<sup>68</sup> In his 'manifesto', Prebisch undertook for the first time the task of understanding the mechanisms of the transference of value from underdeveloped to 'developed' economies.

Due to its focus on 'structural' conditions yielding or hindering development, the ECLAC approach was labelled as *estructuralista* (structuralist), *desarrollista* (developmentalist), or simply *Cepalino* thought, interchangeably. In this approach, the industrial gap between central and peripheral economies – which explained the transference of value towards the former – indicates the necessity of further diversification of the national industry. In a post-hoc explanation, this was conceived as the passage from a soft- or easy-phase of substitution (the import of non-durable consumer goods) to a hard- or difficult-phase of substitution in the import of intermediate (durable consumer) goods and of capital (machinery, technology). Improving the aggregate value to be exchanged was considered, in consequence, as the way to secure control of the national economy and the surplus generated therein. All of which ought to be backed up by the active role of the state and other strategic institutions, and with the key help of foreign inversion.

#### *Marxist and Neo-Marxist Approaches to Underdevelopment*

During this period, the conceptual matrix of the Communist parties in Latin America seemed to offer nothing but a replication of certain slogans from Moscow. The consideration of Latin America as feudal or semi-feudal was the main characterization made by communist parties. This conception projected, first, a national-bourgeois and democratic revolution waged against local oligarchies and imperialism; then, in a temporality in which the productive forces – labour included – mature and become ripen, a socialist revolution. Based on this dichotomy of feudal and capitalist and the consequent need to overcome the former, this official version of Marxism was popularized by means of manuals for the working class (see Kohan, 2003: 50–60). Conversely, the literature produced by the party-intellectuals was more oriented to historiography than to political or economic analysis. In consequence, there was a strong command from Moscow, addressing a

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<sup>68</sup> By means of this analysis, Prebisch was contesting the Ricardian thesis of the "comparative advantages" that each country possesses in the international trade – thesis profusely uttered at the time as argument against the industrialization of the periphery.

markedly stageist political line centred on the dichotomy among feudal and capitalist modes of production. Few notable exceptions confirm the Stalinist rule: Caio Prado Jr. in Brazil, Sergio Bagú in Argentina, and Luis Vitale in Chile.

Dependency approaches were, in contrast, oriented to provide an alternative understanding to these linear and evolutionist conceptions of development. They drew largely upon the school of neo-Marxist economy articulated among *Monthly Review*, of considerable transcendence in the making of *dependentista* concepts. The work of economist Paul Baran was pivotal for Andre Gunder Frank's influential writings. Baran's *The Political Economy of Growth* (1957) contained an important contribution to Marxist theories of imperialism, contemporaneous with Prebisch in the focus on the underdeveloped world as object of analysis. Baran argued that imperialism and monopoly capitalism assure the polarity of developed and backward nations. The 'backwardness' of some underdeveloped areas corresponds, indeed, to a type of development fostered by capitalism and deepened by imperialism. The central mechanism of this structural unevenness is in Baran's argument the drain of 'economic surplus'<sup>69</sup> from peripheral to central economies, a mechanism which reinforces the places already assigned in the world division of labour. Summarizing, Baran describes an imperialist system tending not towards a homogeneous capitalist world, but to the simultaneous and correlative processes of development at one pole, and underdevelopment at the other.

*Monthly Review* contested the 'endogenous' conception of the transition from feudalism to capitalism. Paul M. Sweezy was another collaborator of the journal, very influential in Frank's conceptions, and the debate he held with Maurice Dobb remains canonical on the matter: whereas Dobb put emphasis on the contradictions internal to feudal mode of production (the endogenous explanation of the transition from feudalism to capitalism), Sweezy stressed instead an external dimension – world commerce – as explanatory factor for the emergence and consolidation of the capitalist mode of production. Also influent for the dependency school was Baran

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<sup>69</sup> Theodore Edwards summarizes Baran's argument on economic surplus: "Baran shows how the systematic export of their economic surplus to the advanced areas of the world contributed to rapid accumulation in the West and resulted in so-called 'underdevelopment' in the rest of the globe." (1957).

and Sweezy's *Monopoly Capitalism*, particularly in the idea of stagnating economies (more on this below; see however Astarita, 2010, ch. 1).

Andre Gunder Frank drew largely upon the neo-Marxism of *Monthly Review*. He adopted the framework of a single and interconnected world system wherein a chain of metropolises and satellites were unequally distributed. The historical process of capitalism is therefore depicted as the combined 'development' of metropolises and 'underdevelopment' of satellites. The hypothesis of a 'structural dependence' hindering development comes from this account; from it, a twofold conclusion was in order: 1) underdevelopment does not correspond to an early stage in the capitalist 'normal' process, but a stable form of participation in the international market; 2) underdeveloped countries cannot 'develop' properly, due to their subordinate place in the world division of labour. The title of Frank's article (appeared in *Monthly Review* in 1966) became a slogan of *dependentismo*: "The Development of Underdevelopment". Two years later, his book *Capitalism and Underdevelopment in Latin America* formulated a critique to the conception of Latin America as 'dual' and 'feudal'. For Frank, America was from the very beginning attached to the capitalist market: "the expansion and development of capitalism incorporated the Indian population into its exploitative monopoly structure immediately upon conquest" (1968: 126-27); they should be considered as capitalist economies at large.<sup>70</sup>

Frank's work was influential for a perspective-shift to approach economic development as a matter of two interrelated levels: on the one hand, the international patterns of accumulation and transference of value in benefit of the metropolitan centres, and on the other, the conditions preventing development in the periphery - engendering 'underdevelopment', that is. This is the characteristic framework of dependency analyses. Frank's 'theory of underdevelopment' allowed an approach to backwardness not as 'lacking' capitalism, but in terms of a structurally subordinated position within the capitalist system. In Jaime Osorio's

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<sup>70</sup> Frank (1978) would later relativize this assertion, acknowledging the coexistence of capitalist and pre-capitalist structures throughout the underdeveloped world. However, his notion of capitalism as founded in both the orientation to the market and the profit-motivation of economic agents have remained the source of strong criticism among Marxist authors. Robert Brenner (1977) famously coined the idea of "neo-Smithian Marxism" to characterize this approach.

terms, his work was “supported more in brilliant intuitions than in a rigorous theoretical background” (2004, 137). Simplifying a convoluted, complex moment, but also rescuing from oblivion to those 1940s dissenters (Bagú, Vitale, Prado Jr.), Steve Stern describes this period in the following terms:

As the 1950s and 1960s unfolded, several experiences – import-substitution industrialization, the cold war, the Cuban revolution, intensified political polarization – contributed to a context in which the initial dissents of the 1940s were taken up and debated extensively. The result was a complicated series of dialectics: between CEPAL-oriented intellectuals and policy makers and the mainstream West; between ‘moderate’ Latin American advocates of development, influenced by the CEPAL idea and the promise of import- substitution, and their more “radical” Latin American critics and associates; among CEPAL-oriented colleagues, as part of a healthy process of self-evaluation; and between the orthodox left, inclined to see the necessity of a ‘bourgeois revolution’ to transform a Latin America still encumbered by feudalism, and an innovative left, increasingly convinced that it was the historic spread of international capitalism, beginning in the Age of Discovery, that explained Latin America's poverty and apparently anachronistic economic structures. (1988: 834)

The same author reminds that the originality of Frank’s intuitions has been overestimated, since authors such as Sergio Bagu, Luis Vitale, or Caio Prado Jr. held similar perspectives as early as in the 1950s. In the Caribbean area, the redefinition of the role of colonialism in the making of capitalism had a parallel in the influent work of C. L. R. James, chiefly his 1939 *Black Jacobins* (1980). Be this as it may, both the developmentalist perspective of *Cepalino* thought, and the approaches that questioned the feudal thesis in Latin America, were of great help for the formation of the dependency hypothesis; the typical modernization template of feudal/traditional and capitalist/modern was challenged by a perspective in which an actually global capitalism works through an inherently unequal structure of centres and peripheries. The notion of dependency was associated with those of periphery and underdevelopment, and the clarification of the particular dialectics

among these positions and conditions became a leitmotiv of *dependentista* approaches.

## 2. The Making of a New Question

The key ideas of *Cepalino* thought were: a conception of capitalism as a global economic system; the international division of labour as structuring that system; the existence of large industrial centres, on the one hand, and periphery zones on the other. The thesis of deterioration in the terms of trade served as explanation of the dynamics of this world structure. And the concern on the extent to which the global economic transformations occurring after the II World War will impact Latin American countries, was followed by a period of optimism regarding the success of ISI policies. As Fernando H. Cardoso and Enzo Faletto put it, “[t]he implicit general presupposition of this conception was that the historical bases of the Latin American situation pointed to a kind of eminent national development”. However – they go on – “[t]his optimistic perspective has been vanishing since the late 1950s.” (1978: 6) The period invited to put into question ECLAC’s core thesis, as the substitution of imports had hardly advanced from non-durable to intermediate and capital goods, with some exceptions in Mexico, Brazil and Argentina. Alone, this stimulus to industrialization seemed powerless to conduct the ‘ripple effect’ in the consumption patterns. The growth of real wages did not seem enough stimuli for the invigoration of internal markets, and unemployment showed unprecedented levels as well as dramatic manifestations, such as the rise of a massive ‘informal sector’. Further, the exacerbations of the problems in the balance of payments ran in parallel to the rising of direct investments of foreign capital in the industrial sector, both indicative of the aggravation of the dependence condition.

Therefore, dependency analyses emerged as a response to the exhaustion of the developmentalist roads undertaken by Latin American countries, and also as a critique of *desarrollista* or *Cepalino* conceptions of development. It can be also considered as part of the intellectual and political energies unleashed by the Cuban revolution (cf. Stern 1988). This is not only true in relation to the overcoming of the linear stageism promoted by the Marxism of Communist parties – the two-phases strategy to socialist revolution. Further, the active solidarity displayed by the Cuban

revolutionaries, chiefly in the struggles for national liberation in Africa and Central America, was arguably part of the transformation of a commonly considered 'national' problem into a Third-World orientation.

*The School of Santiago: the Disenchantment with Development*

The *dependentista* perspective was not least the outcome of an encounter produced in a definite intellectual milieu. In 1962, the Latin American and Caribbean Institute for Economic and Social Planning (ILPES in its Spanish acronym) was inaugurated in Santiago as ECLAC's "sociological complement" (Love, 1996: 191). Two years later, the military coup against Joao Goulart in Brazil was the first of a series of political takeovers that led many leftist intellectuals to exile, Chile being one of the preferred destinations. At that time, this country was under an increasing climate of reforms, first under the government of the Christian Democracy since 1964, and more decidedly with the coming into power of Marxist politician Salvador Allende and his Popular Unity bloc in 1970. The 'Chilean road to socialism', an unprecedented process of social mobilization and political radicalization fostered from below (forms of popular power) and above (a declared Marxist president and political coalition) gave further shape to a type of intellectual committed to political projects and their urgencies - the *compañero intelectual*. 'Intellectual comrades' were, in varied forms, political organizations and degrees of involvement, Frank, Marini, Bamberra, Dos Santos, Faletto and Cardoso.

The 'school of Santiago' bound together a variety of intellectuals and scholars from different countries and academic backgrounds; it was not a single-voiced perspective, but rather a realm of debates wherein the concept of 'dependence' was advanced from various viewpoints, leading to dissimilar conclusions. There are numerous attempts to classify the perspectives gathered together in Santiago under the label of 'dependency theory'. Gabriel Palma (1978: 898), for instance, proposes to consider three major approaches in this school. There is a group formed by Frank, Marini, Dos Santos, and Hinkelammert, who attempted to construct a "theory of Latin American underdevelopment", tracing a causal relation between dependence and underdevelopment. A second group is composed by Furtado, Pinto, and Sunkel, who tried to reformulate ECLAC's analyses from a critique of the "obstacles

to national development". And a third group was premised by the avoidance to build a mechanic-formal theory, aiming instead to the analysis to "concrete situations of dependency" to draw conclusions about developmental possibilities. Conversely, Jorge Larraín (1989: 111-14) recognizes the value of Palma's classification, but proposes to consider the notion of capitalism conveyed as the central qualifier.

In my turn, I will borrow Fernanda Beigel's (2010) institutional classification in order to introduce what, in my view, was more a assemblage of ways of reasoning, questions, and categories in debate than a discussion organized in stable frameworks. A centripetal assemblage to be sure, as it revolved around 'dependence', and it took place in institutional locales and academic niches. Beigel's classification is thus instrumental to account for the diversity of perspectives comprised in the dependency field, facilitating the delineation of three main institutional frames: ECLAC; ILPES (and subsequently the Latin American Faculty of Social Sciences, FLACSO); and the Centre of Socio-Economic Studies (CESO) of the University of Chile together with the Centre for Studies of the National Reality (CEREN) of the Catholic University. There were of course transferences of positions, but above all of ideas, among these locales - something which turns this classificatory exercise into only a reference in the later reconstruction of the 'dependency moment'.

ECLAC was the paradoxical place of the early criticism (say, from within) of the *Cepalino* theses. For this reason, some commentators prefer to talk of the authors of this version of dependency analysis as "transitional intellectuals" (cf. Grosfoguel, 1997: 493). Brazilian Celso Furtado, and Chileans Aníbal Pinto and Osvaldo Sunkel, represent a *desarrollista* radicalisation of ECLAC's approach. Furtado (1964), for instance, was one of the first to argue that the ISI model has increased, and not reduced, the dependency to foreign capital; by taking over local industries (expression of which will be latter termed 'new dependency'), multinational corporations had concurred to reinforce underdevelopment. Sunkel (1972), in turn, diagnosed a twofold process of 'transnational' capitalist integration which resulted in 'national disintegration' for Latin America, expressed in popular marginalization and a permanent tendency of the salaries to decrease. Focusing on the Chilean case, Pinto (1959) offered the metaphor of a head-body unbalance, where the head

(representing the political and social institutions) has been developed, but this was not reflected in the maturity of the body – the economic structure, that is, does not coincided in time with its own head. He offered the notion of ‘structural heterogeneity’ as explanatory concept to account for the combination and connection of a primitive, quasi-colonial sector, a modern sector linked to the world market, and an intermediate sector which defines the average national incomes.

Conversely, ILPES hosted the collaborative work of Chilean sociologist and historian Enzo Faletto and Brazilian sociologist Fernando H. Cardoso. Having the latter arrived to Santiago in 1964, it is noticeable that as early as 1965 the draft of *Dependency and Development in Latin America* commenced to circulate among *dependentista* scholars. Once published in 1968, this work was immediately regarded as an indisputable landmark in the debate. Its methodology combined a Marxist consideration of the ‘structures’, productive relations in particular, with a more Weberian focus on the capacity of ‘agency’ that social and political forces display within a system of domination.<sup>71</sup> In their own words, the method stressed “the socio-political nature of the economic relations of production” (Cardoso and Faletto, 1979: ix). What is more, the authors disqualify the construction of abstract, formal ‘theory’, preferring instead to talk about concrete historical situations of dependence. On the concept of dependence, they used it as a “causal-significant” concept (1978: 20), meaning the consideration of a historically determined social relation as related to subjective meanings of action, rather than as a causal-mechanic, external determination.

University of Chile’s CESO was the place of the more radicalized approach to the subject. CESO was formed in 1965, and was rapidly taken over by *dependentista* themes at different levels of analysis, particularly since Theotonio dos Santos created the Group of Dependency Research. A list of some titles published under the ‘CESO-Notebooks’ (*Cuadernos del CESO*) is indicative of the themes and orientations of this research collective: Theotonio dos Santos’ *The New Character of Dependence* (1968) and *Dependence and Social Change* (1970a); and Orlando Caputo

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<sup>71</sup> The influence of Max Weber in ILPES and FLACSO was significant, chiefly due to the presence of José Medina Echavarría. He was a Spanish-born sociologist exiled in Mexico during the Civil War, where he was the first translator to any language of Weber’s posthumous *Economy and Society*. Later, since 1952 Medina Echavarría took residence in Santiago de Chile, where he was first part of FLACSO, and then of ILPES from 1960.

and Roberto Pizarro's *Imperialism, Dependence and International Relations* (1971). Other important publications of CESO's members were Vania Bambirra's *Ten Years of Insurrections in Latin America* (1971), Gunder Frank's *Lumpenbourgeoisie: Lumpendevelopment. Dependency, Class and Politics in Latin America* (1971), Marini's *Underdevelopment and Revolution* (1969) and the first drafts of *Dialectic of Dependence* ([1973] 1977), Dos Santos' *Socialism or Fascism: a Latin American Dilemma* (1969), and Tomas Vasconi's *Dependency, Superstructure, and Other Essays* (1970).

In 1971, CESO co-organized the symposium 'Transition to Socialism and the Chilean Experience', in collaboration with CEREN; an event in which the majority of *dependentista* intellectuals located in Chile gathered together. In CEREN, an intellectual circle working on themes of cultural imperialism and ideological dependence was established. In it, Belgian sociologist Armand Mattelart worked with Chilean playwright and essayist Ariel Dorfman, a collaboration whose outcome was the influential work *How to Read Donald Duck* ("Para Leer el Pato Donald", of 1971). The cartoon is analyzed in this work as Disney's ideological naturalization of the relations of subjugation and exploitation imposed by the US over Latin America and the rest of the 'Third World'. In another register, German-born economist, philosopher and theologian Franz Hinkelammert worked to re-incorporate the ideological realm into socio-economic analysis. In works such as *Ideologies of Development and Dialectic of History* (1970) and *Dialectic of Uneven Development* (1972), he provided a critical account of the economic reduction that the idea of development suffers in the capitalist mode of production. He explains this 'functional reduction' as part of the necessary ideologies that contribute to 'functionalize' social structures and behaviours towards the maximization of profit. Michele Mattelart, Pablo Freire, Hugo Zemelman, Tomás Moulián, Jorge Larraín, Rafael Echeverría, Manuel Antonio Garretón, Norbert Lechner, and René Zavaleta Mercado were also part of CEREN in different moments.

It is beyond the possibilities of this research to consider all these works properly. However, it is convenient to distinguish three possible different meanings of the idea of 'dependence'. First, it may be considered as a historically- and geopolitically-situated realm of debates with a centripetal character - a 'school'. Second, it deals with the structure of exploitation-cum-domination characteristic of the relationship between central and peripheral, 'underdeveloped' economies. And

third, it is a renewing interpretation of the history of Latin America, that is, a critical revisionism of historical accounts produced under evolutionist frameworks, that laid the ground for a reconsideration of the question about this region's 'belated' character.

Since not a well-centred 'paradigm' or a systematic 'theory', what this brief survey shows is rather a heterogeneous intellectual assembling gathered around some questions: Is it possible to overcome underdevelopment, given the situation of structural dependency that Latin American countries hold in the capitalist world system? How to account for these processes at both its 'external' and 'internal' dynamics, that is to say, from the dialectic interplay of international constraints and national structures and agencies? What are the particular political dynamics brought forth by these ('a-typical') structural arrangements? What role does the ideological-cultural realm play in these processes? What level of generality is possible to reach from the *dependentista* approach? Can this approach be considered as a sufficient explanatory theory of Latin America underdevelopment? And, last but not least, does the category of 'dependency' correspond to a Marxist theoretical framework, or can at least be coherently situated within it?

*Dependency Analysis: Minimal Definitions and Common Grounds*

In the 1970 article "The Structure of Dependence", Theotonio Dos Santos summarized more than half-decade of reflections about the matter:

By dependence we mean a situation in which the economy of certain countries is conditioned by the development and expansion of another economy to which the former is subjected. The relation of interdependence between two or more economies, and between these and world trade, assumes the form of dependence when some countries (the dominant ones) can expand and can be self-sustaining, while other countries (the dependent ones) can do this only as a reflection of that expansion. (1970b: 231).

Albeit it has been criticized because of its formalism, i.e. lack of historical content (cf. Palma, 1978), this definition brings to the fore the basic analytical commitments

of dependency analysis. First, the refusal to consider underdevelopment either as a 'belated' stage in the capitalist road or merely as 'lack' of development. Therefore, underdevelopment it is not a 'condition' or 'stage' but a particular form of the process of global capitalist development. In a similar vein, Hinkelammert (1972: 33) coined the formula of "the structural presence of development's absence". This, in turn, displaces the consideration of development from the historical unilinear model of advanced and backward economies to the geographical and geo-political structure of centres and peripheries. Consequently, both development and underdevelopment are redefined in terms of relational and combined processes whose foremost dynamics are situated at the level of the international division of labour.

Second, and as a critique of Frank's formulations, Dos Santos indicates the need of a deeper analysis of 'internal' social structures that these relations of dependence bring about: "the unequal and combined character of capitalist development at the international level is reproduced internally in an acute form" (1970b: 234). Therefore, the process under consideration is not purely of 'satellization' - Frank's hypothesis - but encompasses the formation of domestic structures of a particular kind. The condition of dependency involves the interwoven formation of external positions and internal dispositions; and the correction of Frank's schemes help to clarify the notion of capitalism at work in dependency analysis, amounting to the specification of the dialectical - not causal-mechanical - relations between global forces and local arrangements; a dialectics that demands to take into account the local, class-based actors, their interests and political orientations. Frank had gone as far as to assert that Latin America has been capitalist since the sixteenth century, when the region was incorporated to commercial capitalism. The 'dependency school', conversely, established that the formation of the modern capitalist system occurred not before the late-eighteenth and early-nineteenth centuries, with the consolidation of the industrial revolution in North-West Europe. This was also the moment of political independence for most Latin American countries. Thus, the breakdown of colonial ties with the metropolis, and the prevailing hegemony of *laissez-faire* policies found newly politically-independent countries in a position to assure the provision of raw materials and foodstuffs necessary to maintain the industrialization process, as well as new

markets for selling off non-durable industrial products. (Marini, 1977, ch. 1 and 2) The formation of national societies is thus approached as a breakthrough signalling the passage from a situation of colonialism to a condition of dependence. Such a distinction refers to the organization (or not) of 'national capitals', and consequently to their role as intermediate negotiators between the new-born economies and the international market. Thus, what Frank considered as the continuation of centre-periphery relations existing from colonial times will be grasped by the dependency analysis in terms of the re-articulation of such a relation.

In this re-articulation occurring during the 19<sup>th</sup> century, some countries gained certain control over internal production, while others were not able to cope with foreign companies and became thus 'enclave' economies. For Cardoso and Faletto (1979: xviii; see also ch. 3), two different forms of dependent societies emerged in Latin America in this period: 1) enclave economies, and 2) nationally-controlled productive system economies. Although both types shared an export-led orientation, the circuits which capital goes through are divergent, even opposed, in each case. In enclave situations, the capital is foreign-owned to begin with, then invested and transformed within the dependent country into wages, taxes and commodities, and finally realized in foreign markets where these commodities are consumed and profits are retained. For nationally-controlled economies, conversely, the starting point is internal, capital valorization is local, but its realization still occurs elsewhere. Being both export-oriented and dependent, the internal structures of exploitation and domination that emerge from each case were nonetheless markedly different.

The export-orientation that characterized the first decades of independent life in Latin America entered a transitional period at the end of the nineteenth century, due to the transformation of capitalism from 'competitive' to 'monopoly' (Lenin, 1996). The Latin American economies suffered from these adjustments in a double manner. On the one hand, the decrease of the dynamic impulses of external demand helped to accentuate the transference of surplus through unequal exchange, for the export needs compelled to sell cheaper. On the other, dependence of foreign capital was reinforced by means of the intensification of foreign credits, monopoly inversion in large infrastructure projects such as roads, railroads, bridges, and ports, as well as the technological mediation of central economies. The long-term

deterioration in the prices of raw materials and foodstuffs, added to the instabilities of the world market (the 1914-1918 war; the 1929 crack), led Latin American oligarchies to a crisis of dominance marked by the incorporation of so-called 'middle classes' into the economic structure and, concomitantly, to the political arena (Cardoso and Faletto, 1979, ch. 4; see also Bamberger, 1978: 68). These sectors will be the political bases of the projects of national industrialization promoted during the 1930s under *desarrollista* premises.

For Cardoso and Faletto, the existence of key conditions for development was apparent in countries such as Chile, Brazil, Argentina, Colombia, Venezuela and Mexico: 1) a sufficiently large internal market that might be further expanded; 2) an incipient industrial base producing light-consuming goods; 3) abundant foreign commerce derived from agricultural and mining sectors; and 4) incentives to economic growth, by the strengthening of either the exporting sector or domestically invested capital (Cardoso and Faletto, 1978: 5).

#### *The New Character of Dependence: Cardoso and Faletto*

As a commentator notes, *dependentista* authors shared similar approaches about the processes of Latin America about the previous stages of Latin America's history (cf. Henfrey, 1981: 27); the differences come to the fore when they approach the industrialization process (chiefly in its ISI-phase) and the character of the 'new dependence'. For Cardoso and Faletto, the shortcomings derived from the economic reductionism of *Cepalino* analysis motivate the necessity to undertake an integrated analysis of development, meaning the integration of 'economic' and 'sociological' factors into the analysis; not as aggregation of facts but as an exercise of redefinitions of perspectives oriented to capture the "particular historical conditions – economic as well as social – underlying the processes of development" (1978: 17). The differences of the patterns and degrees achieved by industrialization processes are indicative of the socio-political nature of economic relations. Marx himself – the authors go on – conceived capital as a social relation. Dependence can thus be conceived in the following terms: "a system is dependent when the accumulation and expansion of capital cannot find its essential dynamic component inside the system", due to the coercive international framework (1979: xx). Nevertheless, the

variability within this broad and abstract definition is explained as the product of particular political arrangements that cannot be fully explained merely from economic factors.

These methodological premises point to the fact that the international system of domination “reappears as an ‘internal’ force, through the social practices of local groups and classes which try to enforce foreign interests” (1979: xvi). The concept of dependence, in this sense,

tries to give meaning to a series of events and situations that occur together, and to make empirical situations understandable in terms of the way internal and external structural components are linked. In this approach, the external is also expressed as a particular type of relation between social groups and classes within the underdeveloped nations. For this reason, it is worth focusing the analysis of dependence on its internal manifestations. (1979: 15)

Therefore, dependence is conceived as the ‘expression’ of these external constraints *within* the economic and social structures of peripheral societies. Particular trajectories forge particular “situations of dependence” (1979: xxiii). The focus on the concrete historical processes advocates for a comprehensive social science in terms of the integration of different levels of analysis. The authors refer to the proposed methodology as ‘historical-structural analysis’, a perspective able to overcome the mere structural perspective so as to come to terms with concrete situations of dependency (1979: x). Historical means here idiographic, the interpretative reconstruction of cultural orientations and significations embedded in the political. As a category, dependence becomes a ‘causal-significant’ one, in contradistinction to ‘causal-mechanical’ explanations. In doing so, a Marxist approach based on structural and class analysis amalgamates the Weberian focus on subjectively meaningful actions.<sup>72</sup>

What this perspective seeks to open to the *dependentista* analysis is the non-deterministic nature of dependence, which amounts to comprehending the mechanisms of self-perpetuation *as well as* the possibilities of transformation

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<sup>72</sup> See Cardoso and Faletto (1978: 20). For Weber’s idea of significant causality, see R. Swedberg (2005: 29-31). For an account on Weber’s importance in the formation of the *Cepalino* thought, and of the role of Medina Echavarría in it, see Faletto (2005).

comprised in dependent societies. Cardoso and Faletto (1978: 104) argue that the kind of national-populist project waged from the 1930s relied on the type of political agreement accomplished in the previous transitional phase. What has given physiognomy to the existent industrial bourgeoisies, therefore, is the state as the place of force-condensations through which the national orientations are defined. In their own terms, Latin America has witnessed the seemingly paradoxical process through which “the formation of an industrializing [*industrializadora*] bourgeoisie [has] depend[ed], in varying degrees, on the State.” (1978: 101)

*Dependency and Development in Latin America* offers two main reasons for the limitations and final failure of the ISI model. The first is the contradiction between mass participation and the consolidation of the private sector, that is to say, the pressures for further participation in the sphere of distribution and consumption versus the needs of investment derived from capital’s logic of accumulation, which in turn took singular forms depending on the class-politics giving frame to the process (cf. 1978: 115, 121, 139). The second is the new transformation of the relationship between centres and peripheries, in a moment in which capitals from the former began to be directly invested in the productive systems of the latter, a fact addressed by the authors in terms of the “internationalization of [national] markets and the new character of dependence” (1978: 130ff). The new character is determined by the articulation, at the level of the productive process, of foreign monopoly capital, local private enterprises, and state economic unities (see also Cardoso, 1972: 89).

Contemporarily, “the unification of the productive systems leads to the supra-national determination and organization of internal markets” (Cardoso and Faletto, 1978: 150). This helps to explain the paradoxical presence of a relative yet unequal economic diversification together with an increasing loss of control over the key internal economic dynamics – that is, industrialization-cum-heteronomy. This paradoxical developmental road is conveyed as a pattern of “associated development”,<sup>73</sup> the association of local and foreign capitals. The critical meaning with which the term is used at the end of the book is evident: “Thus, what could have been a modernized social and political development, ended to run into the

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<sup>73</sup> Marjory Urquidi (1979: 153) translates *desarrollo asociado* as “development with association”.

same seemingly dead-end street: modernization is achieved to the cost of a crescent authoritarianism, without reducing the typical profile of poverty of the 'development with marginality'." (1978: 135)

One of the foremost problems Cardoso saw in the more conceptual (in the sense of abstractly theoretical) treatments of the subject is the conflation of dependence and economic stagnation, something that the ideologue of 'development of underdevelopment' had raised to the status of a theoretical certainty. The rejection of the generalist theoretical pretensions of dependency analysis will be made clearer by Cardoso in his article dealing with the 'consumption' of dependency theory: structures of dependence – it is argued – are historical relations of contradictory historical social processes, not the abstract unreeling of forms of accumulation originated elsewhere (cf. 1977: 13). The crux of the dependency analysis is, therefore, to unfold the *coincidences in interests that exist between local dominant classes and external capital*, and not alleged 'laws of motion' of dependent capitalism.

Conversely, the 'dependent-associated development' was considered by Cardoso as the historical outcome of the ISI period. It is, as the term makes explicit, a form of development within – that is, without overcoming – structural dependence. For the author, Mexico and Brazil more recently put into evidence that dependency and development are not incompatible. Cardoso further argues that the association of foreign and local capitals with the state, far from the perpetuation of economic stagnation or retardation, has stimulated the internal market and set the basis for the diversification of production, signalling thus the road towards a transition from absolute to relative surplus-value. Therefore, Cardoso (1977: 24) concludes, dependent-associated development demonstrates the compatibility of development and monopoly penetration, showing also that there are more dynamic forms of dependence than those of enclave or quasi-colonial situations.

#### *Marini's Dialectic of Dependence*

The stagnation thesis entailed in the ideologue of 'development of underdevelopment' discussed by Cardoso, was coined and popularized by Frank. However, it was Ruy Mauro Marini who gave it a more systematically Marxist

framework. In a certain sense, the latter's version of the dependency hypothesis is the exact reverse of Cardoso's. First, it was theoretical in the strong sense; that is, oriented to comprehend the 'laws of motion' of dependent capitalism. Marini understood the shortcomings of Frank's thesis (to which he nonetheless adhered in its more profound meaning) not in economic reductionism, but rather in the lack of conceptual density at the level of political economy. For Marini, Frank focuses merely on the circulation level, without considering the determinant role of capital's production and reproduction. In contradistinction to Cardoso, the *economic* side of the formula 'political economy' is emphasized in Marini's account. Outlining the encounter of Marxism with a *dependentista* perspective, he asserts that "the fundamental task of a Marxist theory of dependency is to establish the specific legality by means of which the dependent economy is governed" (1977: 62). According to Jaime Osorio (2004: 138), Marini's most important work, *Dialectic of the Dependency*, set the bases for a political economy of dependence, culminating the transition of the category from its inception in a conceptual realm alien to Marxism to assume a Marxist theoretical status.

Marini distinguishes two central mechanisms in the formation of a structure of dependence. The first, more commonly acknowledged, is the transference of value from peripheral to central economies by means of international trade – namely, unequal exchange (1977: ch. 2). In this sense, he engages with the overcoming of the notion of terms of trade by that of unequal exchange, as Arghiri and Bettelheim's *L'échange inégal* ([1969] 1972) advanced.<sup>74</sup> The Brazilian Marxist explains that this detrimental flow is at the basis of the specialization of labour in metropolitan economies, for the availability of cheap aliments and raw materials provided by Latin America worked as a decisive factor in the transit from absolute to relative surplus-value. The latter, understood in terms of the combination of increasing productivity and the loss of labour-power's real value, is explained by Marini as a consequence of the diminishing of basic-goods prices fostered by Latin American exports (1977: 14). The superiority in labour productivity gave Western countries a central position in the international division of labour, composing thereafter the structure by means of which the surplus-value transference to the metropolis is

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<sup>74</sup> I am thankful to Juan Grigera for this and other extremely helpful comments on this matter.

channelled through international commerce. The channels of this unequal exchange, explains Marini, are two: to sell above the value (something possible within the laws of exchange, according to Marini's reading of Marx), and to apply monopoly policies that break these laws in order to purchase raw materials for under their value (1977: 18–20).

Nonetheless, unequal exchange is only the most apparent feature of the dependence. In Marini's account, the structure of dependency only becomes fully expressed in its last, most fulfilled stage, once Latin American countries have created their own spheres of reproduction for capital's accumulation and production.<sup>75</sup> Marini's central hypothesis is that, as a compensatory mechanism for the flow of surplus value from periphery to metropolis, Latin America ought to pursue a form of capital accumulation founded "on the super-exploitation of the labourer" (1977: 30). This means that the loss of surplus-value is compensated by means of the "intensification" (1977: 22) of the labour process. He defines super-exploitation as a combination of three different mechanisms: intensification of the labour process, extension of the working day, and expropriation of part of the socially-necessary labour of the worker. Therefore, super-exploitation "tends to be expressed in the fact that the labour-power is remunerated for under its value" (1977: 58). (Marini does not clarify whether this entails a structural prevention for the extraction of relative surplus-value, or we are before a *sui generis* form to do so.) By means of the under-payment of labour, which seems to be the key mechanism in Marini's argument, the appropriation of part of the worker's fund of consumption is transformed into a fund for capital's accumulation.<sup>76</sup> Super-exploitation lies at the basis of the possibility to build an industrial sector in the periphery.

In order to realize its expanded reproduction, capital depends on the formation of its own mode of circulation. Hinkelammert (1972: 21) recalls Marx in

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<sup>75</sup> In this sense, it is only partially fair to consider Marini's theorization as a mere repetition of Rosa Luxemburg's schemes of expanded reproduction of capital (which are in the basis of her theory of imperialism), as G. Palma (1978: 901) does.

<sup>76</sup> Marini draws upon Marx's (1976: 747–48) passage in *Capital*, Vol. I, Ch. 24: "In the chapters on the production of surplus-value we constantly assumed that wages were at least equal to the value of labour-power. But the forcible reduction of the wage of labour beneath its value plays too important a role in the practical movement of affairs [...]. In fact, it transforms the worker's necessary fund for consumption, within certain limits, into a fund for the accumulation of capital".

this sense, since “the premise of simple reproduction is incompatible with capitalist production”. As oriented to external markets, the commodities produced by peripheral economies do not depend on the internal capacity of consumption in order to realize the exchange-value they contain. Put otherwise, the dislocation is produced as the actualization of the exchange-value (the requisite for the appropriation of surplus-value) is realized elsewhere. For Marini, this amounts to a fundamental dislocation between production (within) and realization (out) characteristic of dependent economic structures. The processes of industrialization wherein super-exploitation is preponderant as a mechanism of capital production and accumulation, generates the internal reproduction of this divorce between production and consumption:

The [industrial] production based on the labour’s super-exploitation engendered thus once again the mode of circulation which corresponds to it, at time that divorced the productive apparatus from the masses’ needs of consumption. The stratification of this apparatus in what has been called ‘dynamic’ [...] and ‘traditional’ industries is reflecting the inadequacy, proper to dependent capitalism, between productive and circulation structures. (1977: 47)

Super-exploitation is declared, in consequence, as the “foundation of dependence” (1977: 64) inasmuch as it discloses the main form of surplus-value extraction, and hence helps explain the dislocation between production and reproduction of capital characteristic of dependent societies. In this sense, the “new dependence” – that is, monopoly capital directly invested in industrial production, or in Cardoso and Faletto’s account, the “internationalization of the conditions for internal markets” (1978: 60) – only invigorates this tendency. The workers’ consumption does not intervene but secondarily in the realization of the commodities produced in the periphery making the divorce of spheres more dramatic. In the highly-dynamic sectors of production localized in some areas of the underdeveloped world, capital employs a small amount of workers; conversely, this production is chiefly oriented to middle-class consumption and to external markets, a type of demand from which the masses are largely excluded. In consequence, economic diversification does not result in a more coherent articulation of production and circulation; on the contrary, its outcome is the formation of large sectors of non- or under-employed urban

proletarians, a marginal population overexploited and underpaid, for whom to survive means to overwork, to incorporate more members of the family into the labour market, and to recur more and more to the pre-capitalist sectors of subsistence. The dislocation between experience of exploitation and consumption capacity is considered also as the source of important political consequences.

*The Dependency Hypothesis: between Bourgeois Reformism and Ultra-Leftism*

The exchange between Cardoso and Marini was the summit of the dependency debate (cf. Sotelo Valencia, 1994: 292). This peak moment was also the outset of a partial decline in the currency of *dependentista* categories throughout intellectual and socialist circles in Latin America.<sup>77</sup> The 1980s witnessed a shift in the concerns of left-wing intellectuals towards the nature of the state transformations under military regimes; *circa* 1985, it was overwhelmingly focused on transition to and consolidation of democratic regimes. We will return to these topics in the next chapters. Meanwhile, I shall note that the discordant points of this exchange are less clear and definite than what has been often assumed (cf. Palma, 1978; Chilcote, 1982; Larraín, 1989). I tend to agree with Ramón Grosfoguel (1997) in considering the continuities of the *dependentista* framework as more significant than the differences, despite the overtones and passionate arguments through which the exchange was carried out. Therefore, the debate can be read *as a determinate debate*, the deployment of contrasting positions in what arguably was a shared (but neither pre-fixed nor monolithic) analytical and discursive realm.

In a virulent text co-authored by José Serra, Cardoso opened the attack to Marini's positions in 'Las desventuras de la dialéctica de la dependencia' ('Misfortunes of the dialectic of dependence'), appeared in *Revista Mexicana de Sociología* in 1978. The main substantive aspects of Marini's theory questioned by Cardoso and Serra are, first, what the authors consider the confusion between

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<sup>77</sup> In this polemic, nonetheless, a large number of Marxist authors participated, coming together from analytical perspectives as diverse as 'mode of production analysis' (cf. Chilcote, 1982; see also Chilcote and Johnson, 1983), 'theories of unequal exchange' (cf. Emmanuel, Furtado, and Elsenhans, 1982; see also Amin, 1976) - not to speak of 'world-system analysis (Wallerstein, 1976 and specially 1980, 1989; see also Frank, 1978, 1983; and Frank & Gills, 1993). All of them were certainly influenced, positively or negatively, by dependency analysis.

'unequal exchange' and 'deterioration in the terms of trade'; second, the causal relation assigned to the decreasing of the rate of profit for periphery capitals for the growth in productivity of central economies. The third and crucial point under criticism lies in the, for them, untenable nature of the category of 'super-exploitation'. Regarding the former two points, the authors hold a perspective that once again turn the argument to 'internal' or 'endogenous' factors. Notwithstanding the fact that the terms of international trade do deteriorate against the periphery - Cardoso and Serra argue - this does not prevent the increase of productivity or the expansion of demand, insofar as "unequal exchange refers to the relations between productivity and prices, as well as to the evolution of these relations [...]. The concept of deterioration in the index of the terms of exchange refers only to the variations of the price relations, without direct consideration to productivity." (1978: 27) Clarifying this distinction, the diminishing of the rate of profit by means of the deterioration of the terms of trade occurs only to the extent that the flow "is not caused by the unequal exchange in itself, but by reasons related, for instance, to supply and demand." (1978: 25)

From these premises, the need for a compensatory mechanism for local capitals in order to maintain a minimal rate of profit - the hypothesis of super-exploitation - demonstrates to be untenable: "[t]he whole analysis of the 'necessary super-exploitation' is based on a gratuitous presupposition: that there was an increase of export production in the periphery under necessary conditions of decreasing (or stagnant) productivity" (1978: 25-6). What these authors find particularly misleading is the reduction of exploitation mechanisms in Latin American to the extraction of a "surplus-value that is never relative", i.e., absolute surplus-value alone (1978: 42). The tendency to the intensification or lengthening of the working day (under constant wages and without pressures towards technological innovation) is disclosed as Marini's way to reaffirm the stagnation hypothesis, the basis of the 'development of underdevelopment' ideologeme. His critics, conversely, present figures, tables and data to demonstrate that what happens is precisely the opposite: expansion of demand, growing labour productivity, economic diversification - that is, classical capitalist development.

The vehement criticism displayed in "Misfortunes..." closes as it opened up: by pointing out the political consequences of Marini's perspective: "economic

reductionism [...] kills the nerve of political analysis, grounding it in a catastrophic standpoint that is never accomplished [*catastrofismo que nunca se cumple*].” (1978: 27) This kind of theorization (and here the explicit target is Marini, but Cardoso had arguably also in mind Dos Santos, Bamberger, and others – not to mention Frank himself) amounts to a “politically suicidal voluntarism” (1978: 27) of the kind of *guerrilla* armed-struggles. In the terms provided by Colin Henfrey (1981), the radical version of dependency theory tried to fill the theoretical void of the post-Stalinist era by means of the image of a mis-centred, unconformable (*lumpen*)proletariat, the social subject appealed to by armed-vanguards pursuing its own *lumpenrevolution*. Cardoso and Serra conclude that the main source of error rests on the confusion between the contradictory nature of capitalism and the presence of obstacles that temporarily hinder it: what Marini conflates is the historical non-viability of the ‘*nacional-desarrollista*’ project, a particular modality of capitalist development, with the exhaustion of capitalist development as such. Cardoso and Serra stress the usefulness of the notion of ‘dependent-associated development’ to understand concrete processes of development-in-dependence, dismissing the formula of ‘development of underdevelopment’.

Marini’s counter-attack, entitled ‘The reasons of neo-developmentalism (reply to Fernando H. Cardoso and José Serra)’, appeared in the same volume of the *Revista Mexicana de Sociología*. There are two main claims in this response. The first is the intellectual dishonesty of the critique.<sup>78</sup> The second and more substantive point is the lack of rigour exhibited by the critics in dealing with Marxist categories and method. The conception of the labour theory of value becomes the kernel of the debate, as the critics refuse to consider the transference of value through international trade insofar as “not having mobility of the labour power, is difficult to establish the concept of socially-necessary working time [...] crucial for the operation of the law of value” (Cardoso and Serra 1978: 23–24). Marini, in turn, indicates his critics’ confusion between values and prices: the fixed character of the

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<sup>78</sup> The authors of “Misfortunes” proceed by mutilating, taking out of context, and even adding sentences and terminology attributed to Marini, something which is profusely indicated in the latter’s response. This procedure, I must add, goes on without a minimal of critical rigour, something which is evident for example in the arbitrary use of quotation marks all along Cardoso and Serra’s text. Last but not least, Cardoso and Serra’s article appeared in Brazil in the journal of CEBRAP, the centre of studies which the authors belonged to; they never agreed to publish Marini’s reply.

labour power only affects production; however it is commodities that, through their value, compare the different socially-necessary working times contained in their exchange-value, through a relation of prices (1978: 175).

Dussel has offered an argument similar to Marini in which dependence is related to the distribution of value via international trade, where 'total national capitals' of different organic composition are put into a relation of *competition*. Dependence is, therefore, a social relation between capitals which occurs exclusively within international market relations: "dependency, in its essence, is strictly the extraction of surplus value through *industrial* capitalist competition." (2001: 228) 'Extraction' here does not mean creation but transference. What is at stake in both Marini's and Dussel's view is the mechanism of equalization of prices (the passage from value to price) occurring in the international market as the source of unequal exchange. As Dussel explains:

Where there is an international exchange of commodities which are products of total national capitals of different levels of development [i.e. different organic compositions] [...], the commodities of the more developed country will have a lower value. Competition, however, equalises the price of both commodities at a single average price. In this manner, the commodity with a lower *value* [...] obtains a *price* greater than its value, which it realises by extracting surplus value from the commodity with a higher value. Therefore, the commodity of the less developed capital, although it may realise a profit [...], *transfers surplus value* because the average international price is less than the national value of the same commodity. (2001: 225)

Dussel's formulation of the argument is concordant with Marini's reasoning. In the Post Scriptum of *Dialectic of Dependence*, the Brazilian Marxist offers a sort of methodological clarification, for which the need to privilege the conditions of realization of capital, rather than the productive level alone: "[i]t is only to the extent that the dependent economy as such becomes an actual centre of capital production [...] that incorporates its own circulation phase – and which achieves maturity when an industrial sector is constituted – that its laws of motion are thoroughly manifested, expressing every time a particular expression of the laws

that rule the overall system.” (1977: 53) Once this industrial sector is built, it becomes evident that, in international competition, capitals of different organic compositions are confronted, which means the integration of diverse forms and degrees of exploitation into a single relation of prices; hence the importance (neglected by Cardoso and Serra) of a correct understanding of the transformation of values into prices (1977: 176).

Conversely, it is only under conditions in which a ‘mature’ sphere of capital circulation is established that super-exploitation reveals its centrality in a dependent structure. Marini affirms his core-thesis once again: dependent capitalism, based on the super-exploitation of the working class, “divorces the productive apparatus from the masses’ consumption needs, aggravating thus a general tendency of the capitalist mode of production” (1978: 189). This is not to say (as Cardoso and Serra conclude) that the workers’ unproductive consumption does not play a role in the internal market; rather, Marini affirms that “due to the restriction of popular consumption, super-exploitation does not transform [this consumption] into a dynamic factor of realization, leading the branches oriented to popular consumption towards ‘stagnation, even to regression, or to become expanded but based on the world market.” (1978: 188) This clarification implies that the productive units oriented to the internal market are those inclined to stagnation – not the system as a whole.

Finally, Cardoso identified the thesis of super-exploitation with the exclusive presence of absolute surplus-value. Marini, in turn, maintains a conceptual ambiguity in this regard. He sometimes maintains super-exploitation in opposition to relative surplus value; in other moments (for instance, in the Post Scriptum), he conceptualizes super-exploitation not as a form of exploitation as such but rather as combination or integration of different forms and degrees of exploitation: “combinations of forms of capitalist exploitation are carried out unequally in the system as a whole, engendering different social formations according to the predominance of a determined form”. (1977: 59) Furthermore, “super-exploitation does not correspond to the survival of primitive modes of capital accumulation, but it is inherent to such accumulation and grows correlatively to the development of labour’s productive force.” (1977: 59) What is suggested here is that super-exploitation is concomitant to capital accumulation, but it does not correspond to its

ideal form. The Brazilian case – the exemplification of ‘dependent-associated development’ for Cardoso and Serra – is re-read by Marini as the dramatic reduction of real wages, the lengthening of the working time necessary for the labour force’s reproduction, and the incorporation of more members of the family to the labour market – in a nutshell, the central tendencies underlying the so-called ‘Brazilian miracle’, so cheered under the presidency of Cardoso himself.

### 3. A Critical Balance of the Debate

The advance of the dependency hypothesis during the decades of the ‘60s and ‘70s was the intellectual outcome of elaborated responses to ECLAC’s *desarrollismo* as well as to orthodox Marxism’s conceptions of Latin America as feudal. The incorporation of the global dynamics of centralization and peripheralization in the analysis reinforced the comprehension of the economic and political structures of the region; hence, this hypothesis comes into the scene amidst the tensions between *desarrollismo* and different versions of the Marxist theory of imperialism, and was developed in Santiago de Chile (the seat of ECLAC). However, by the mid seventies the diagnoses about the fall of dependency theory began to gain currency (cf. Camacho, 1979), a process accompanied by the proliferation of military regimes which generated a partial shift of concerns from questions related to development and dependency to themes dominated by political concerns, in particular by democratic restoration. Therefore, the profuse presence of dependency analysis in Latin American intellectual and political circles, evident until mid-1970s-1970s, was eclipsed during the second half of this decade; the ‘death certificates’ casted upon the dependency hypothesis were accompanied by a shift in the themes and topics that since then occupied the intellectual agendas of Latin American intellectuals. By and large, these scholars turned from political economy to political science, focusing now on the character of the authoritarian regimes proliferating everywhere in that period. The political claim for autonomous development was thus replaced by the concern for the conditions of transition from authoritarianism to democratic regimes, as well as the possibilities of the latter’s consolidation –in which was known, not without ironic rings, as the sciences of ‘transitology’ (*transitología*) and ‘consolidology’ (*consolidología*) (Vitullo, 2001). In this regard, and although Cardoso

had made his case around the 'consumption' from the US of a version of dependency theory closer to his opponents than to his own, what became evident in Latin America was that the intellectual topics were increasingly closer to his own side; in Cardoso's own titles, the mid seventies were the moment of passage from *Dependency and Development* to *Authoritarianism and Democratization* (Cardoso, 1975; see also Fernando H. Cardoso, 1979).

Despite what the large number of 'death certificates' might indicate, it seems to me that the 'dependency hypothesis' was buried alive. The neoliberalization processes that in some cases accompanied, and in others followed, military and authoritarian regimes in Latin America were based to a great extent on certain structural tendencies predicated by the dependency school. 'Adjustment measures' was the euphemism incubated by the 'Washington consensus' and promoted by the IMF, the World Bank and the US Treasury Department, in order to label the package of structural reforms for 'developing countries', including: privatization of public goods, state enterprises and social security systems; devaluation of the currency; intensification of the working day and introduction of new forms of labour flexibility (such as home-based work); reduction of tariffs and other trade barriers to external companies –all of which rings like 'super-exploitation'. These measures were further accompanied by the increasing presence of foreign capital and the trans-nationalization of some local capitals –not to mention the revitalization of the extractive sector by means of renewed forms of "accumulation by dispossession", constitutive for Harvey (2009) of the "new imperialism". What seems incredible is the dismissal of the dependency hypothesis at the very moment that the dismantling of the whole social edifice that, however precariously, had been built during the industrializing period was taking place –i.e., when the non-viability of the historical project of national development (the core thesis of the dependency analysis) was becoming more and more apparent throughout Latin America.

Despite what the large number of 'death certificates' might indicate, it seems to me that the 'dependency hypothesis' was buried alive. What seems telling here is that the progressive (and never full-fledged) dismissal occurred in the period of rollback of the social edifice that, however precariously, had been built during the industrialization period – i.e. when the historical project of national development was being dismantled all over the region. The neoliberalization processes that in

some cases accompanied, in others followed, authoritarian regimes, were the material content of the grounded on structural tendencies already observed by the dependency school. 'Adjustment measures' was the euphemism coined by the so-called Washington consensus, a coinage that packed the economic reforms promoted by the IMF, the World Bank, and the US Treasury Department for 'developing' countries. This package included: the privatization of public goods, state enterprises, and social security systems; devaluation of the currency; intensification of the working journey and introduction of new forms of labour flexibility such as home-based work; reduction of trade barriers to external companies - all of which rings like 'super-exploitation'. These measures were further accompanied by the increasing presence of foreign capital and the transnationalization of some local capitals, not to mention the revitalization of the extractive sector.

Apart from the displacements in the intellectual topics and political motivations of the period, there are also theoretically internal reasons to be considered so as to understand the decline in momentum of dependency analysis. In the debate Cardoso-Marini debate, in particular, what one considers 'development' is seen for the other as 'underdevelopment'. Cardoso sees capitalist development in the economic diversification, the invigoration - within limits - of internal markets, the growing of middle classes, and the integration to mass-consumption of working class segments. With the notion of development associated with dependency, nonetheless, he stresses two points: that development and dependency are compatible; therefore, we are dealing with form of *capitalist*, that is, of conflictive and non-harmonious development. Talking about dependent capitalist development, he argues that "one speaks necessarily and simultaneously of socioeconomic exploitation, unequal distribution of income, the private appropriation of the means of production, and the *subordination* of some economies to others." (1977: 17, original emphasis) Marini, in turn, sees in Cardoso's allegation nothing but underdevelopment - expressed in the tendencies of the payment balance, the structural difficulties for local capital to accumulate and reproduce itself in a 'progressive' form, and the recourse to super-exploitation, marginalization, and lack of minimal integration at the level of capital's expanded reproduction.

From a terminological standpoint, Cardoso is right to render the economic diversification established – however with consequences opposed to the *desarrollista* expectations – during the ISI period as a form of *capitalist development*. Consequently, his conclusion (i.e. there is not irreducible contraposition between development and dependence) is also correct; the latter must be seen as a particular form of the former, within a rank of variation subjected not only to economic laws but also to conjunctural instabilities, social upheavals, and political decisions. Nonetheless, in my view Marini's emphasis on underdevelopment is expressive of the refusal to endorse with the rank of 'development' the processes underwent by Latin American countries during the 1970s and '80s. The stress he puts in underconsumption and marginalization, the increasing of a proletariat's reserve-army (instrumental to the perpetuation of the tendencies in the international division of labour), the consolidation of conditions of heteronomy, and the reinforcement of the divorce between spheres of capital – all this made him cautious (and for good reasons) to use a term highly semantically charged with future-images of fulfillment for the post-colonies. This is implicated in Marini's accusation of Cardoso as an apologist of dependent capitalism, in the blurring of important structural differences between advanced economies and Latin American societies.

In these terms, the abusive codification of the notion of development, based on a particular image of capitalism, overlapped the conflation of levels of analysis and the indeterminacies in the use of national and class analyses, all of which conspired against the vitality of the dependency hypothesis. John Kraniauskas (2005: 54) indicates that the conception of "development as *more development*" became the most salient adoption of development ideology in the post-colonies. In the case of dependency analysis, either in its version of further diversification or in the claim for further coherence in capital's cycles, the common ground lies is a given standard for determining the 'more' of the formula: Western capitalism as Latin America's 'developed' mirror. More concretely, the dependency school was prisoner of the 'national' narrative of capital development, either in affirmative or negative stances.

Given this ideological straitjacket, and perhaps inevitably, the continuum which goes from 'less' to 'more' development – and the stageist conceptions derived from it – contributed to occlude the basal hypothesis emerging out of dependency

analysis: the multiplicity, unevenness, and combined character of the capitalist paths of development. However, once divested of this narrative in which a typical, normal, autonomous, and integrated 'national' capitalism is the central analytical reference, the dependency hypothesis comes close to the idea of uneven and combined development. It underlies the multiplicity of societal development, the interconnections between societies unfolding unevenly, the combined forms of structuring of these connections, and the diverse social dynamics emerging out of these intersections (cf. Anievas and Nişancıoğlu, 2015). These forms of development have sometimes taken 'national' paths; this, nonetheless, does not imply that individual nation-states are the sovereign subjects of development. Or, to put it differently, the logic of the nation is internal to the logic of capital, which is first and foremost global. As Marx put it in the 1874 French edition of *Capital*: in the age of mechanical industry, the dynamics of international trade – that is, of capital as global capital – achieve precedence over domestic production and trade.<sup>79</sup>

Conversely, Lenin seems to complement these indications about 'so-called development' in his notes on Hegel's dialectic, affirming that

[t]he two basic (or two possible? Or two historically observable?) conceptions of development (evolution) are: development as decrease and increase, as repetition, *and* development as a unity of opposites (the division of a unity into mutually exclusive opposites and their reciprocal relation). [...] The first conception is lifeless, pale and dry. The second is living. The second *alone* furnishes the key to the 'self-movement' of everything existing; it alone furnishes the key to 'leaps', to the 'break in continuity', to the 'transformation into the opposite', to the destruction of the old and the emergence of the new. (1961: 358)

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<sup>79</sup> Kevin Anderson (2010, 188) quotes Marx's further remark on the 'Law of General Law of Capitalist Accumulation' (explaining precisely the interplay of forms of surplus-value extraction) in the French edition: "only after mechanical industry had struck root so deeply that it exerted a preponderant influence on the whole of national production; only after foreign trade began to predominate over internal trade, thanks to mechanical industry; only after the world market had successively annexed extensive areas of the New World, Asia and Australia; and finally, only after a sufficient number of industrial nations had entered the arena – only after all this had happened can one date the repeated self-perpetuating cycles, whose successive phases embrace years, and always culminate in a general crisis [...]".

To conceive development beyond its restrictive, 'national' narrative, means to take into account capital's inherently contradictory trends at a global scale, which turns out to help explain the outcomes of these trends upon domestic dynamics. On the one hand, there is those unbalances derived from capital's tendencies to competition; such unbalances are evident not only in geographical variety of performances, but also in the comparison of branches of production and productive units. On the other hand, a combined structure becomes visible out of all these uneven 'aspects', 'sectors', and 'locations', a system of relations in which some of them 'develop' (in the one-sided version of the concept, in Marx's and Lenin's terms) at the expense of the others. And this is precisely what I consider the kernel of the 'dependency hypothesis', as expressed in both Marini's insistence about the Latin America's pivotal participation in the consolidation of metropolitan, industrial capitalism, and in Cardoso and Faletto's parallel persistence in considering local realities as inscribed at the core-logic of capitalist development.

Put differently: stripped of the ideologeme of the 'development of underdevelopment', specifically of its generalizing pretensions, what becomes evident is the combination of (uneven) development and dependency conditions. What is more, it is necessary to conceptually relate political control over local economies to the formation of domestic dynamics of partial centralization and concentration of capital. In doing so, Marxism's 'determination in the last instance' of the political by the economic helps to prevent one of the *dependentista's* dead-ends: the consideration of politics as the determining instance by default, that is, by the apparent lack of economic 'centre'.

Neither considered as an absolute special law of motion nor as a matter of incidental political engagements and effects, and above all de-fetishized from its bourgeois-nationalist narrative, the dependency hypothesis attains a field of questions that arguably go far beyond the assertions of those who formulate it. Based on a multi-linear, non-deterministic but nonetheless determined conception, the dependency hypothesis was the intellectual *pre-text* opening up the questioning (once again, albeit under new frameworks) of both Latin America's ties to the 'modern' world and its particular conditions of existence in such a world; this time, from a viewpoint about social revolution that can be fairly called as 'des-centred' – de-centred from both Stalinist and *nacional-desarrollista* historical narratives. In what

became an inconclusive debate, the category of 'dependency' condensed a theoretical-political moment of Latin American Marxism. The 'dependency moment' emerged thus as an endogenous process of scientific paradigm-building in Latin America (Beigel, 2010a process which, I add, 'developed' under political commitments and vital urgencies (exile, secrecy) involving the common destiny of a continent. While some dogmatic Marxists accused 'dependency theory' of narrow petit-bourgeois nationalism, a fairer criticism may suggest to recognizing in this perspective the traces of an incipient, and unresolved, Third World discourse.

## V. Marxism in Dialogue: Aricó and the Translational Task of the Materialist Historian

'Just as the history of the Church is not identical to the history of Christianity and does not wholly define its boundaries, the history of Marxism is rather more than the vicissitudes of the vulgate and the 'deviations' from it. Apart from its specific history as an institution and as a dogma, the history of ideas and intellectuals, it is undeniable that it also has another discontinuous and decentred history, full of hidden expressions, lost paths and diverse temporalities; an esoteric and pluralist history expressing the multiplicity of initiatives, goals and results of the struggle waged by the subaltern classes.'

José Aricó, *Marx and Latin America*,  
Epilogue to the Second Edition, 1982

### 1. 'Wandering Behind the Political Subject': the Argentinean Gramscians

During much of the twentieth century, Mexico held a remarkable policy of open doors aimed at sheltering a significant number of politicians, artists, and intellectuals expelled from their homelands. Trotsky is perhaps the more illustrious among them, yet this was also the case of the Peruvian Víctor Haya de la Torre and the Cuban Julio Antonio Mella during the 1920s; of the Spaniards Luis Buñuel, Adolfo Sánchez Vázquez, Wenceslao Roces, José Medina Echavarría, and Leon Felipe, and the Argentineans Aníbal Ponce and Arnaldo Orfila (among many others) during the rule of Lázaro Cárdenas in the 1930s. Therefore, it does not seem a pure matter of historical chance that the Mexican Communist Party (the first of its kind in Latin America) had been founded in 1919 (i.e., in the aftermaths of the Mexican revolution) by individuals of so diverse a provenance as the Indian M. N. Roy, the Japanese Sen Katayama, the US-American Charles Phillips, or the Russian Michel Borodin.

Later, a significant group was received during the late-1960s and '70s, in a list that counted the Argentineans José Aricó, Enrique Dussel, Juan Carlos Portantiero and Oscar Terán; the Brazilians Ruy Mauro Marini, Theotonio Dos Santos, and

Vania Bambirra; the Ecuadorians Agustín Cueva and Bolívar Echeverría; the Chileans Hugo Zemelman, Orlando Caputo, and Jaime Osorio, the Peruvian Aníbal Quijano... and the list could go on. They were largely recruited by universities and academic institutions, as well as in other cultural spaces such as editorial houses and journals.<sup>80</sup>

Mexico was an ‘exceptional’ place in its own right.<sup>81</sup> For almost seven decades, but with particular intensity during the 1960s and ‘70s, the country paradoxically combined those open doors policies which helped the leftist intelligentsia of the continent and beyond, on the one hand, and the highly-institutionalized rule of the single party, on the other. During its long-lasting reign of almost eight decades, the PRI (Institutional Revolutionary Party, the organization that claimed to be heir of the Mexican revolution) conveyed a quite effective combination of co-optation (of opposition parties, trade-unions, cultural agents, intellectuals, and peasant-voters), repression (the Tlatelolco massacre in 1968, the Guerrero massacre in 1974), and redistribution (namely of land). In this regard, Peruvian right-wing writer Mario Vargas Llosa famously (and misleadingly) coined the idea of the PRI’s Mexico as “the perfect dictatorship”.<sup>82</sup>

This post-68 exile-generation was thus situated in a country where a far from democratic state sheltered intense and prolific debates within Marxism and other leftist currents. Considerations about the meaning of the defeat and the pitfalls of political strategies and tactics that ushered it, the structural and ideological consequences of military regimes, along with more theoretical disquisitions such as concerning the particular conditions of Latin America’s capitalism and class struggle, or the value and pertinence of Marxism vis-à-vis the evidence of such particularities, were among the topics of the debates that marked this period. José

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<sup>80</sup> For a panoramic survey of the waves and trajectories of the Mexican exile during the twentieth century, see P. Yankelevich coord. (2002).

<sup>81</sup> For a brilliant and inspiring account on the Mexican contemporary history, based on cultural processes and focused on sovereignty – and its constitutive ‘exceptions’ –, see G. Williams (2011).

<sup>82</sup> Vargas Llosa’s intervention took place in a Mexican TV set, in the context of a colloquium of Latin American intellectuals entitled ‘XXth Century: the experience of liberty’ and organized by *Revista Vuelta*. See Vargas Llosa (n.d.). As a response to Octavio Paz’s plea for democracy, the idea of ‘perfect dictatorship’ was put forth to brackets the differences between political systems and regimes across Latin American countries – in my view, this was already part of his neo-liberal campaign for president of Peru, in a rally he would eventually lose to Alberto Fujimori.

Aricó is perhaps the name that better expresses the intersection of these themes along with the polemics they conveyed, given his crucial, tireless activity as editor, translator, and columnist in his more than 40 years of dealings with Marxism. As we will see, the Marxism he advocated was grounded in a long-lasting (yet shifting) encounter with Gramsci. The Italian communist supplied Aricó not just with concepts and methods but, perhaps more significantly, with questions and problematizations on the basis of which it was possible to reinvigorate Marxism's commitments with social transformation. As I will concentrate my argument on the part of Aricó's work produced in Mexico, a brief survey of his pre-exile trajectory might be in order.

*The Group Pasado y Presente: On Gramsci's (Many) Uses*

Aricó's first engagements with Marxism began with his affiliation to the Córdoba section of the Argentinean Communist Party (PCA) during his high-school years in the late 1940s.<sup>83</sup> Influenced by Héctor Agosti, Aricó embraced at that time a Marxist-Leninist reading of Gramsci. Agosti was an intellectual of the PCA who translated, for the first time into Spanish, the edition of *Quaderni del Carcere* prepared in Italy by Palmiro Togliatti. The PCUS' XX Congress was no doubt significant for Aricó's generation, particularly regarding the prestige of Marxism-Leninism in the context of the recognition of Stalin's rule as a dictatorship based on the cult of personality. Soon after, this dissatisfaction was accompanied by the positive impact of the Cuban revolution across the continent. All of this was coterminous with the falling of Perón in 1955, an event that made evident the incapacity of Argentinean communism to come to terms, conceptually as well as politically, with the new features of the Argentinean working classes and other subaltern groups.

At the time of his expulsion from the PCA in 1963, Aricó already possessed a reading of Gramsci that can be fairly considered as 'heterodox', that is, oriented to putting Marxism beyond the framework of Soviet DIAMAT and HISTOMAT, by

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<sup>83</sup> For an auto-biographical account of his (and of the group that came together in the journal *Pasado y Presente*, by extension) Gramscian influences and orientations, see J. Aricó (1988). Two excellent, well-informed reconstructions of Aricó's Gramscian influences are R. Burgos (2004) and M. Cortés (2015). For a more critical survey, see D. Gaido and C. Bosch (2014).

means of a focus on what the Italian Marxist called the task of 'organizing the culture'. Aricó's initial reading of Gramsci, accordingly, was premised on attention to the cultural tasks neglected by the party. In this context, the appearance of the journal *Pasado y Presente*, whose Gramscian echoes are apparent in the very choice of its name, marked a young, promising generation's rupture with official communism. The publication in 1963 of this independent (not directly affiliated to the party, that is) journal by the Cordoba-based communist militants Aricó, Óscar del Barco, and Héctor Schmucler ushered their expulsion under the charges of revisionism. Conversely, the Cordoba-based core-group rapidly incorporated other ex-communists and youthful leftist such as Juan Carlos Portantiero and José Carlos Chiaramonte from Buenos Aires. The fact that the journal *Pasado y Presente* could constitute so quickly a distinct, identifiable group in the landscape of the Argentinean left might be considered as a signal of the increasing dissatisfaction with the Marxist discourse offered by communist parties at the time –something not exclusive to Argentina but true of Latin America more widely (and beyond).

The lack of interest in dialoguing with other philosophical and theoretical currents, on the pretext of the 'self-sufficiency' and 'autonomy' of Marxism, was no doubt one of the acknowledged touchstones of official communist orientations. In the image given by this discourse, the theory appeared as a fixed and closed doctrinaire body (namely, DIAMAT and HISTOMAT) ready to be applied to any given reality, geography, or realm of knowledge. In contradistinction, the editorial of the journal's first issue –written by Aricó himself– addressed *in nuce* what will be a permanent preoccupation of his work: namely, to put Marxism into dialogical relationship with other intellectual currents and worldviews. In his own words, the task consists in "do not leave aside, because of immediate political considerations, diverse aspects of human knowledge [...] abandoning [thus] to bourgeois ideology realms that Marxism claimed as its own as early as in 1844" (cited in Cortes, 2015: 41). In this sense, Aricó identifies this open, dialogical disposition as part of Marxism's attitude towards reality from the very beginning.

For these reasons, the Gramscianism displayed by the group *Pasado y Presente* can be considered as a 'Marxism in dialogue'. This dialogical orientation implicated, in a nutshell, a strategic openness towards other theoretical traditions and cultures in order, first, to inform Marxism about contemporary debates, angles

and events, and then to invigorate its own critical scope. In words that pertain to the inaugural 1963 editorial, this dialogical dimension was defined as coextensive with the consideration that “the autonomy and absolute originality of Marxism is also expressed in its ability to comprehend the exigencies to which other worldviews [*concepciones del mundo*] respond.” (cited in Cortes, 2015: 41) The journal therefore established a space for cultural-political interventions and exchanges, with the aim of invigorating revolutionary theory by means of dialogue with contemporary debates and contenders.

During its lifetime, *Pasado y Presente*'s 'Marxism in dialogue' adopted shifting, perhaps eclectic conceptual stances and political orientations. In its first epoch (1963-1965), it was informed by a combination of Castro-Guevarismo or 'foquismo', Maoism's 'cultural revolution' (mainly by means of its Althusserian reception), and Italian *Operaismo*. To begin with, during 1963 and 1965 the group collaborated in a semi-clandestine manner with the Argentinean guerrilla-foco *Ejército Guerrillero del Pueblo* ('People's Guerrilla Army'), which had established itself in the border province of Salta (allegedly under the command of Ernesto 'Ché' Guevara himself) in a short-lived political endeavour (cf. Burgos, 2004: 106). The relation with Althusser and 'Althusserianism' was more lasting but equally conflictive, for the latter's anti-historicism evidently clashed with Gramsci's perspectives and arguments. Amidst of this tension, Althusser was welcomed by the group (chiefly by Del Barco, and to a lesser extent by Portantiero) insofar as the prospects of *Lire le Capital* and *Pour Marx* helped to consider the non-transparency of Marxism, that is, the internal tensions that constitute it, and hence the possibility of taking it up as a theoretical object (cf. Del Barco, 1982). The claims made by the French philosopher about the scientific status of Marxist theory -intimately interwoven with its political status- as well as his consideration of the science of history -historical materialism, that is- as a new problematic field, were part of the elements adopted by the group (cf. Starcenbaum, 2011).

Furthermore, the new radicalism that emerged with the Turin-based *Quaderni Rossi*, the germ of Italian *Operaismo*, afforded a re-reading of Gramsci's *Ordine Nuovo* period. The *Pasado y Presente* group turned to contemporary Italian debates as a way of elaborating a fresher perspective about the workers movement in the 'advanced' sector of the Argentinean economy. This movement reached a climax in

the events popularly known as the *Cordobazo*, the Cordoba uprisings occurring between 1968 and 1970 concentrated in the automobile industry, in what constituted the country's '68 moment (cf. Petra, 2013: 125–29; see also Gago and Sztulwark, 2015). Finally, during *Pasado y Presente's* second phase in 1973, once again the orientation of the journal shifted; now towards Montoneros, a mixture of urban guerrilla and mass-front organization formed by the fusion of grassroots Christian, former guerrilla and socialists, and university groups engaged with *Peronismo*. Within a dialogue with national-popular perspectives, the 'national question' re-emerged as a central theoretical motif in Aricó's writings and editorial efforts (cf. Burgos, 2004: 169–230).

A programmatic summary of the critical motivations behind the group appeared as early as the 1964 editorial '*Examen de conciencia*' ('Self-examination') of *Pasado y Presente's* fourth issue:

The facts have demonstrated the historical weakness of a leading group incapable of appropriately resolving the task of expressing Marxism within national life, of knowing the country's reality, of structuring an organization that actually brings out the proletariat's organized consciousness, of solving the past within the present, the historical experiences with current requests, the old with the new revolutionary generations, through a permanent adaptation to global fluctuations. (2005: 243)

In a Gramscian fashion, the historical weakness of the PCA is formulated as the inability to translate Marxism into national life, to elaborate it as a veritable language that can speak to Argentinean struggles. Two tasks were derived from such a historical weakness: first, to provide the foundations of a revolutionary class-consciousness; and second, to adequately incorporate the concrete history of the country and the continent in contemporary demands. These tasks, in turn, were assumed by the group –and by Aricó in particular– by means of the merciless criticism of Marxism understood as an ecclesiastic orthodoxy, in an endeavour characterized by the reformulation of Marxism as a dialogical, translational space of commitments, learning and exchanges.

Perhaps the best way to explain the shifts in orientation derived from these motivations is by recalling Aricó's retrospective remarks on the matter: "I think the life of the journal was marked by this wandering behind [*deambular detrás de*] the political subject." (cited in Cortés, 2015: 59) In a country in which official communism seemed to be disqualified theoretically and politically from coming to terms with the complexity that class struggle and the organizational forms-cum-contents of the popular masses –a country, moreover, in which a national-popular movement was taking place by other-than-socialist means–, these intellectuals-without-a-subject were at pains to uphold and unfold the hegemonic energies of Marxism. However volatile their energies might seem today, these leaps and shifts were the expression of the actual gulfs between theory and subject. In turn, these gulfs demanded a patient consideration of aspects of reality as apparently disconnected as the workers' councils, the prospects of a cultural revolution, the guerrilla-foco tactics, the idea of national-popular will, and so on. All of which –I must insist– was driven by the demand to enlarge and enhance Marxism as a worldview able to take up and respond to the challenges posed by contemporary capitalism.

Be that as it may, the focus on the 'organization of culture', along with the mobilization of the notion of 'organic intellectual', were perhaps the most important hallmarks of the group. Indeed, its contribution to the diffusion of Marxism and other critical perspectives in Latin America is hard to overestimate. Led by Aricó, in 1968 they started the book series Cuadernos de Pasado y Presente (heretofore CPyP) with the publication of a critical edition of Marx's 'Introduction' to the *Grundrisse*. From then on, CPyP published 98 books during its existence in Argentina (first in Córdoba and then in Buenos Aires) and Mexico, until it closed in 1983. Aricó also took the responsibility of a new translation of Marx's *Capital*, made by Pedro Scaron,<sup>84</sup> as well as the first Spanish translation of the *Grundrisse*. Both publications were published by Siglo XXI, with which Aricó collaborated to the point of taking

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<sup>84</sup> Pedro Scaron was also responsible of a book that, in Horacio Crespo's view (2014, xxiii fn), was highly influential for Aricó's *Marx and Latin America*. Scaron translated in 1968 a complete collection of Marx's and Engels' passages on Latin America, entitled *Materials for the History of Latin America* and published by Cuadernos en Marcha in Uruguay in 1968. In 1972, the second edition of this work was published by CPyP.

charge of its book series 'Biblioteca del Pensamiento Socialista' during his exile in Mexico.<sup>85</sup>

*Translation: The Task of the (Peripheral) Materialist Historian*

In Aricó's tenacious work of translation and publication of a significant body of literature pertaining to the Marxist tradition, Martín Cortés identifies the kernel of his intellectual efforts. Together with the organization of culture displayed through editorial enterprises, the practice of translation appears as the unifying thread of Aricó's Marxism. In this sense, one can say that translation becomes his characteristic contribution to Latin American Marxist theory. Accordingly, Cortés defines Aricó's Marxism as, "first of all, the unfolding of an immense strategy of translation that has as its objective to introduce into the Latin American debate diverse problems, texts, debates, and translations, always under the sign of the theoretical-political relevance of this exercise" (2015: 40).

As I noted in Chapter I, the task of translation was a major concern of Gramsci's *Quaderni*. The Italian Marxist considered translation as a pathway to come to terms with the question of the comparability between national and regional realities within the world capitalist framework, as his reference to Lenin's 1921 organizational questions demonstrates (cf. Gramsci, 1995: 451). It is this world capitalist civilization that makes possible the dialogue among cultures; however, these dialogues are considered by Gramsci and Aricó not in terms of an already-given fact, but rather as the ground through which a patient work (of translation) must take place. For there is no 'perfect' translation among languages -no language is completely transparent to another, that is-, the mere application of an allegedly definitive set of principles to every culture was considered as part of the mechanistic illusions of dogmatic Marxism.

Reflecting in *The Devil's Tail* ('La cola del diablo') on the value of Gramsci's Marxism for Latin America, Aricó wrote in 1988 that "if the same idea transferred from the theory's centres of production into our own periphery, it turns out to be of

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<sup>85</sup> Siglo XXI was founded in Mexico in 1966 under the direction of Argentinean-exiled Arnaldo Orfila, who was dismissed from his position in the State-owned publisher Fondo de Cultura Económica by command of then President Diaz Ordaz. Aricó was the main person in charge of its Argentinean branch until his exile in Mexico in 1976.

necessity another thing: What is or could be 'our Gramsci'? What decompositions and recompositions must we provoke upon the Gramscian analytical corpus so that it is in condition to enlighten our reality or part of it [...]?" (1988: 41) And in a conclusive passage of the same book, he added: "There is an obvious necessity to confront our own, different realities in Latin America, with those theoretical and political paradigms demanding less exceptional, infinitely more cautious 'translations' in order to be used." (1988: 114) There is no doubt that Aricó here makes reference to Marxism (but not only to it) as one of those paradigms and theories that need to be patiently translated so as to come to terms with the particular reality of Latin America. In this sense, the Gramscian use of translational strategies becomes a pathway to both desacralize and reorient (decompose and reconstruct, that is) the Marxist conceptual apparatus, so as to serve Latin America's politics in a useful manner.

Following Cortés (2015: 32-6; see also 2013), I assume that Gramsci's and Aricó's understandings of translation were convergent: like the Italian Communist, the Argentinean Marxist comprehended this task as related both to the translatability among languages pertaining to different disciplinary realms *as well as* to the possibility of comparison of national or regional cultural dynamics. In any of these cases, there is no perfect or transparent, but only essential or inessential translations. In turn, this brings forth the necessity of an attentive, politically-informed labour oriented to evaluating the pertinence that one language has in enlightening problems belonging to 'other' domains. This is what Aricó considers as belonging to Marxism's concerns 'as early as in 1844.

Notwithstanding the more diffuse presence of Walter Benjamin in Aricó's writings, I affirm that one can also find affinities in the conceptions of Marxism shared by these intellectuals in their references to the task of translation. This is made explicit in Aricó's intention to read Marx "from the Gramscian-Benjaminean perspective" (cited in Cortés, 2015: 86). In his 1921 writing entitled precisely 'The Task of the Translator', the German thinker referred to translatability as the "essential quality of certain works, which is not to say that it is essential for the works themselves that they be translated; it means, rather, that a specific significance inherent in the original manifests itself in its translatability." (1996b, 254) Holding a perspective similar to Gramsci's about the non-transparency

between linguistic corpuses, and consequently the futility to define a somehow 'essential' original as the objective reference against which a translation should be measured, Benjamin asserted that "no translation would be possible if in its ultimate essence it strove for likeness to the original. For in its afterlife [...] the original undergoes a change." (1996b: 256) The German Marxist makes his own approach clearer towards the end of his article by saying that "[t]he task of the translation consists in finding the particular intention toward the target language which produces in that language the echo of the original." (1996b: 258). In sum, the task of translation has to do with the conveying of the *intentio* of the 'original' language. Consequently, translation does not mean the resource to an original whose alleged essence must be retained in the process, but rather a work of reorganization whereby the pertinence of a theory or language is evaluated in concrete terms.

It is important to bear in mind the twofold dimension entailed in the task of translation approached through the prism of Gramsci and Benjamin. On the one hand, there is the level of translatability among languages in the more traditional sense of linguistic bodies, what is projected further by Gramsci to those disciplinary realms that achieve the status of 'specialized languages' (i.e., philosophy, economics, biology, and so on). At this level, translating a novel or a proverb from English into Spanish would be similar (or, at least, would provoke similar caveats) to translating, say, the notion of 'law' from the realm of physics to history. On the other hand, there is the civilization level envisaged by Gramsci, in which a given term or conception can find a superior explanation in another term belonging to another civilization 'stage'. Gramsci's position, let us recall, presupposes the historical *materialist* consideration that a civilization (namely, capitalism) has 'basically' identical cultural expressions in each of its cultural bodies - even though these 'basically' similar expressions may vary to a great extent. Consequently, the task of the materialist *historian* is situated in the translation "between expressions of different stages of civilization, in so far as each of these stages is a moment of the development of another, one thus mutually integrating the other, or whether a given expression may be translated using the terms of a previous stage which however is more comprehensible than the given language etc." (1995: 451) In this second register, the assumption of a common ground is more complex and remains open to a historical (hence political) perspective.

Aricó's understanding of translation retains this twofold dimension. As it was already seen, the concern that marked his initial motivations as expressed in *Pasado y Presente* and further accompanied his lifelong efforts was the dialogue between Marxism and other contemporary philosophies, theories and worldviews. He used the term 'secular' - non-religious, that is - to refer to these dialogues aimed to invigorate Marxism as a contemporary and operative theory of emancipation that does not neglect any of the achievements of 'bourgeois' ideologies. This, one may say, is the synchronic dimension of translation. Yet Aricó also took into account the second, diachronic level of translation: that of negotiating a path for coming to terms with dissimilar civilization stages and developmental rhythms. From the questions posed by translatability, and through his participation in the promotion of Marxist literature in the region, Aricó approached that unique and crucial (at least in what concerns our argument) problem: the value and function of Marxism in Latin America.

Martín Cortés (2015) and Horacio Crespo (2014) refer to the regionalization or becoming-continental ('*continentalization*') of Aricó's Marxism as a process that made itself felt during his time of exile in Mexico. This Latin-Americanization was expressed in its translational significance by Aricó himself, in a 1986 interview: "For the first time, I knew in Mexico what the indigenous peasantry is; for the first time, I noticed that the same language does not prevent translation problems, but on the contrary it can make them especially difficult." (cited in Cortes, 2015: 207) This observation suggests that the Argentinean experience informing Aricó's Marxism (a Latin American experience, no doubt) allowed for only a partial translation, ill-equipped to come to terms with those elements that, conversely, were fully apparent in Mexico or Peru - chiefly, indigeneity. In other words, this 'Argentinean' Marxist apparatus - however dialogical its relation to other contemporary philosophies may have been - did not afford to be fully translated into dissimilar realities such as Mexico's or Peru's.

This contrast or short-circuit - I argue - signalled the emergence of the question of the conditions of possibility for the translation, and consequent transformation, of Marxist theory *in* and *from* Latin America. In doing so, the translational task brings to the fore the interrogation on the modes of making theory in Latin America. As Gavin Arnall, Susana Draper and Ana Sabau (2015: 143) argue

dealing with the influence of Gramsci, but that can be fairly a consideration about Aricó's Marxism *tout court*, he never 'applied' ideas; rather, ideas were regarded in their possibilities to transform the ability for understanding concrete political and historical processes. Arguably, the experience of being lost in translation before a Spanish-speaking, Latin American country, was an important event insofar as it triggered one of Aricó's more valuable contributions to the reflections on Latin American Marxism: his 1980's *Marx and Latin America*.

## 2. 'The Virtues of the Backward' and the Misencounter of Marx and Latin America

In a number of occasions, Aricó made reference to a long-lasting, really ambitious project he had entertained from early on: to write the history of communism and socialism in Latin America. The project was initially conceived as a composite of historical documents and theoretical reflections. He idiosyncratically called it the *mamotreto*, a Spanish word that can be translated as 'hefty book' and expresses both the large extension and unmanageable nature of the project. It is important to recall this plan, to the extent that most of his more important books and writings were initially conceived as forming part of the *mamotreto*. This is the case of Aricó's influential introduction to Mariátegui's thought from 1979; of *Las Hipótesis de Justo* ('Justo's Hypotheses. Writings on Socialism in Latin America', written in 1981 and published posthumously in 1999); and of *La Cola del Diablo* ('The Devil's Tail: Itineraries of Gramsci in Latin America', of 1988). It was certainly also the case of *Marx and Latin America*, of 1980. These and other works, in consequence, must be considered as fragments of such an unfinished, perhaps unfinishable project.

### *On the Misencounter between Marx and Latin America*

In *Marx and Latin America*, the conceptual locus chosen by Aricó to evaluate the conditions of possibility for the translation of Marxism into Latin America dwells on the category of 'misencounter' (*desencuentro*).<sup>86</sup> The terms of this misencounter are

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<sup>86</sup> A note on translation: the Spanish term *desencuentro* can be directly translated as mismatch or failed meeting. I prefer to render it as 'misencounter', for even though it might be a neologism, I think it best grasps Aricó's meaning: namely, to understand the mismatch

Marx (and, by extension, Marxism) and Latin America. Aricó argues that the misencounter presents an exterior, “taxonomical” surface in the long-lasting classificatory problems the sub-continent has posed to Marxist categorizations: Are these societies colonial or semi-colonial? Are they more akin to the West or to the East? Are they feudal, semi-feudal, or bourgeois? Did they fit into the so-called Asiatic mode of production? Conversely, this taxonomical inadequacy makes apparent the region’s evasion of its subsumption into totalizing theories. Latin America’s non-conformity to the Marxist “bourgeois type” (2014: 3) emerges therefore as the most immediate arena of the mismatch.

Nonetheless, the failure-to-meet is considered by Aricó as not merely terminological but profoundly conceptual, hence political; and its roots are to be found in Marx himself. This observation, on the other hand, could lead to the consideration of Marx’s whole oeuvre as partaking of the evolutionist perspectives in which development follows the lines of the Western-European trajectory. Of course – as Aricó goes on to argue – one can find in Marx this kind of assertion and evaluation. Accordingly, Aricó warns against two generalized misconceptions: to elide Marx and Engels, insofar as the former was more prone to understand history in a non-linear sense; and to neglect the open-mindedness exhibited by Marx’s ruminations about non-capitalist realities in his late writings. (Aricó, the editor, was indeed highly informed by the manuscripts, articles, letters and drafts whereby such disquisitions were carried on. He himself edited, and contributed to the divulgation, of this ‘fragmentary’ part of Marx’s oeuvre through the publications he prepared for CPyP and Siglo XXI. Finally, he also as well as stimulated both the discussion of this corpus and its incorporation into Marxist and socialist debates, a labour for which he wrote prologues, introductions, and remarks about these texts.

Not surprisingly then, Aricó provides in *Marx and Latin America* a well-informed survey of Marx’s texts regarding the Irish question, the Spanish revolution, and the Russian commune, among other sources. These texts display a rich and complex perspective in which evolutionist historical models come under

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between Marx and Latin America through the Althusserian notion of *encounter* – and its missing or failure. In the recent English translation of *Marx and Latin America* that I have consulted here, conversely, David Broder renders it as ‘disconnection’ (2014, ch. Seven), in a translation that I will modify when appropriate.

severe questioning. From his settling in London onwards – Aricó explains – Marx observed that “the establishment of a ‘colonial’ capitalism in fact meant a transformation within the ‘industrial’ capitalist mode of production itself.” (2014: 19) This perspective will be further developed in his later writings on the Irish question, and crucially in his treatment of the Russian commune. Through these investigations, the hypothesis of the uneven development of capitalism becomes fully apparent in Marx’s method. In particular, Marx’s reflections on Ireland during the 1960s (presented by Aricó as the outset of this new perspective) projected an embryo “phenomenology of underdevelopment” (2014: 30).

By means of these texts and fragments, Aricó exhibits a version of historical materialism quite different from the linear, unavoidable sequence of pre-capitalism, capitalism, and post-capitalism. It is possible to find in Marx – the author suggests – a teleological and stage-ordered conception of history, allegedly valid for any country and situation (a philosophy of history, that is) *as well as* a non-linear account of the capitalist world which opens in turn the path to thinking “the question of social revolution in concrete terms” (2014: 36). From the evidence that “historical discontinuity and unevenness was a characteristic proper to capitalist development itself” (2014: 35) – and not a sort of atypical, anomalous outcome –, what these writings bring to the fore (even though in an implicit manner) is for Aricó “the ‘autonomy’ of the national sphere, based on which, *and only based on which*, the question of social revolution can be thought of in concrete terms, or, to put it another way, the question of the concrete possibilities of a conjunction between the fight for national emancipation and the process of class-struggle.” (2014: 36, original emphasis) Aricó situates Marx’s way out from the Eurocentric premises of his contemporaries in the recognition of the relative autonomy of the national, something apparent in the focus on the colonial question. The non-homogeneity of capitalist societies in the international scenario, and the relevance that national configurations have for the prospects of class struggle, constitute the theoretical basis on which Marx built his later perspective.

In consequence – Aricó concludes – “[t]he theoretical and political presuppositions from which the ‘autonomy’ of the Latin-American region could have been understood, then, did exist in Marx’s thought”. (2014: 38) It is precisely the evidence of such non-Eurocentric framework that is so disquieting when

contrasted with the unfortunate considerations Marx advanced in the scant times he discussed Latin America. In this sense, Aricó will propose a ‘symptomatic’ reading of what is perhaps the best example of these misconceptions: Marx’s 1858 article ‘Bolívar y Ponte’. The symptomatic reading proceeds, in my view, along a double pathway. On the one hand, it searches in the text not for what Marx ‘says’ on Latin America, but for what he remained silent about (an Althusserian procedure, in other words; cf. Althusser, 2009: 29ff); on the other, it invites us to consider the article as an indication of Marxism’s ‘weakest link’ – namely, the proper consideration of the political and national dimensions. Let’s look then into the text in more detail.

*A Symptomatic Reading for a Symptomatic Article: Marx’s ‘Bolívar y Ponte’*

‘Bolívar y Ponte’ (included in Aricó’s book as Appendix Nine) was an article written by Marx in 1858 for the *New American Cyclopaedia*. However, the fact that Marx did not choose the subject (it was paid work) does not diminish the worrying form in which he outlined the figure of Bolívar and the relevant events led by him in the struggles for independence waged during the 1810s and ‘20s. The article portrays him as selfish and incompetent individual, whose victories in the independence wars were neither the product of his military abilities nor the result of constituted popular armies. On the contrary, in Marx’s account these successes are explained by the recourse, first, to chance events, and second by the presence of European (chiefly British) soldiers and mercenaries who waged the war on the independence side. This presence proved for Marx to be crucial, as “like most of his countrymen, he [Bolívar] was averse to prolonged exertion” (in Aricó, 2014: 105). These and other prejudiced remarks populate the whole article. In it, Bolívar is described not as a liberator and nation-maker, but rather as a ruling-class dictatorial character all-too obsessed with the prospect of becoming a sort of Latin American Napoleon. In private correspondence with Engels, and defending the style of his article, Marx displayed in full his antagonism against the one known in Latin America as ‘El Libertador’:

[The] article on Bolivar elicited objections from Dana [Charles Dana was one of the *New American Cyclopaedia* editors] because, he said, it is written in a ‘partisan style’ and he asked me to cite my authorities. This I

can, of course, do, although it's a singular demand. As regards the 'partisan style', it is true that I departed somewhat from the tone of a cyclopaedia. To see the dastardly, most miserable and meanest of blackguards described as Napoleon I was altogether too much. Bolivar is a veritable Soulouque. (2010e: 266)

Marx had already established a similar connection in *The Eighteenth Brumaire* between Louis Bonaparte and Faustin Soulouque (cf. 2010d 11:192),<sup>87</sup> a former slave who became president of Haiti in 1852 and then self-proclaimed himself as its Emperor. Therefore, both Louis Bonaparte and Simón Bolívar are referred to as farcical, mimicking characters; however, while Soulouque works in *The Eighteen Brumaire* as a kind of direct mirror-like image of Bonaparte (both being poor individuals pretending to be similar to Napoleon), in Bolívar's article that mirror becomes double: by pretending to be Napoleon, the Latin American leader anticipated and hence demonstrated to be the 'veritable' Soulouque.

Marx's article drew the attention of Aníbal Ponce in 1936, to the point of leading him to include it the second issue of his recently founded journal *Dialéctica*. The journal's section 'Marginal Remarks' was the place in which Ponce himself commented and discussed the texts comprised in the volume. In the case of Marx's article, Ponce's remarks are largely of agreement and approbation; Ponce delivered his own conceptions using Marx's words: "'Bolívar was an aristocrat who under the words <Constitution>, <Federalism>, <International Democracy>, wished only the conquest of a dictatorship making use of force combined with intrigue'. Separatist, yes; democrat, no.'" (1983a: 224) Thereby, Marx's image of 'El Libertador' as an opportunistic buffoon driven by forces beyond his understanding and capacities was reinforced by Ponce. It is worth noticing here that Ponce's explicit aim in republishing and commenting on the article was to undermine the project of

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<sup>87</sup> For an interesting counter, see Murdo MacLeod (1970). The author concludes his account saying that, given the lack of official government records, and despite the generalized portray it has been popularized on Soulouque as a dumb black leader put into power as puppet for a group of mulattos (a vision of which Marx himself participated), in fact "[w]e are left with his policies as they are discernible, with an assessment of the men whom he used to govern, and with our evaluation of how correct his appreciation of the situation really was. In every case we must conclude that Faustin Soulouque was a man of high intelligence, a realist, a pragmatist, and a superb, if ruthless politician and diplomat. There is no denying his patriotism and his ability to impose domestic tranquility." (MacLeod, 1970: 47)

intellectuals such as José Vasconcelos and Haya de la Torre, insofar as they sought to *construct* – in the “manipulative” (1983a: 224) sense of the term – an ‘anti-imperialist’ tradition based on Bolívar’s figure. Ponce’s target was therefore a ‘populist’ manipulation of ‘El Libertador’. (Ponce’s remarks are also included in Aricó’s book as Appendix Seven) A similar approach to this text was provided by Hal Draper (1968) in an article addressed against ‘authoritarian leaderships’ in Latin America and elsewhere.

Aricó rescued Marx’s article from oblivion in his 1980 book, approaching it as a ‘symptomatic’ discourse in order to evaluate the misencounter between these two referents of Latin American revolutionary politics. The most common explanations for Marx’s attitude towards Bolívar (namely, the lack of materials at hand in Marx’s context, and the general negative judgments towards Bolívar made by contemporary scholars and writers) are dismissed by Aricó, something which leads him to the conclusion that Marx’s viewpoint on Bolívar needs to be considered *politically*. The underpinnings of this ‘political’ stance towards Latin America – Aricó explains – are rooted in Marx’s Hegelian heritage (2014: 60–1). This heritage is in turn divided into two main components. The first is an implicit Hegelian operation that considers some peoples (and Latin America’s in particular) as ‘non-historic’, i.e., devoid of historical agency. The second is Marx’s explicitly negative attitude towards Hegel’s consideration of the state as the actual producer of civil society. Aricó suggests that the former factor would not have been as prominent if the latter were absent. This suggestion, in turn, posits the main political determination of these judgements about Bolívar in Marx’s inverted Hegelian model, characterized by a one-sided determination of the state by civil society. In his own words, Marx’s

rejection of the Hegelian conception of the state had the contradictory effect of clouding his vision of a process characterised by an *asymmetrical* relation between economics and politics, such that, unable to identify the ‘rational kernel’ at the heart of the process –the societal ‘law of movement’– Marx reduced ‘politics’ to the purely arbitrary, unable to understand that it was precisely on this terrain that the process of state-construction was coagulating. (2014: 61)

In Marx's model, the rationality of society is associated to with the terrain of political economy, the material development of economy and of social classes; in a context of capitalist underdevelopment, there would be only 'irrational' processes doomed in the last instance to failure – and here is where the notion of 'non-historical people' makes its appearance. In Aricó's view, what is surprising in 'Bolívar y Ponte' is the use and abuse of the fortuitous, accidental or external (the 'irrational', in a nutshell) in the description of Bolívar's struggles against the Spanish colonial forces.

In this sense, Aricó objects to Marx that his procedure is exactly the same that he criticizes in Victor Hugo's account of Louis Napoleon's coup, namely, the substitution of the real social movement and its forces by a false hero (cf. also Aricó 1983, 83).<sup>88</sup> Aricó points out that Marx's miscomprehension of the Latin American independence wars was premised on a narrow understanding of the dialectical interplay of politics and economy, to the extent that "his system would ultimately exclude any positive theory and analysis of the institutional forms and functions of the political." (2014: 63) The privilege with which the economic (equated by the Argentinean author with 'civil society') is invested to the detriment of the state (or 'political society') lies thus at the heart of Marx's misencounter with Latin America: "Latin-American singularity escaped comprehension by this movement not because of 'Eurocentrism', but precisely because it was singular." (2014: 67) In consequence, "it is only natural that societies like those of Latin America where the centre of gravity of the construction of civil society was so noticeable 'from above', would have created a grey area in Marx's thought." (2014: 63) As it becomes evident, the reference to Gramsci's 'passive revolution' is the conceptual corrective that Aricó conveys to come to terms with the misencounter of Marx's conceptual framework and Latin America's singularity.

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<sup>88</sup> Aricó's reference is *The Eighteenth Brumaire of Louis Bonaparte's* Preface to the Second Edition, in which Marx argued that Victor Hugo's *Napoleon the Petit* comes to describe Napoleon III's coup d'état in fashion in which "[t]he event itself appears in his work like a bolt from the blue" (2010: 56–7).

By means of Gramsci's category of passive revolution, Aricó explains that what Marx rendered as Bolívar's individual flaws were indeed social and material elements at work in the making of Latin American countries. He counts the fragile Jacobinism of local elites – largely based on their weak capacity to autonomously command the economy – along with the deep fear of the masses exhibited by these elites, as the two key factors to explain these processes of national constitution 'from above'. In consequence, the missed factor in Marx's account is the consideration of the presence or absence of a "national-popular will". (cf. 2014: 66) Aricó seems to suggest that the Latin American societies were products more of external impulses than of the project of a national class, producing a process that takes place in the midst of a social void. These indications are suggestive insofar as they address, on the one hand, one of the central elements of the 'dependency hypothesis' (in Marini's terms, the subordination of local elites become comprador-classes vis-à-vis the increasing power of central economies), and on the other hand a 'subalternist hypothesis' (the lack of integration of the subaltern classes into the revolutionary process, or 'passive revolution').

In the figure of 'Bonapartism', associated with the figure of Louis Bonaparte as well as to Gramsci's 'passive revolution', the Argentinean Marxist found the explanation of Marx's political blindness towards Latin America: "it is in Marx's sharp anti-Bonapartism that we can locate the *political* motives that led to his resurrection of this notion [i.e., non-historical peoples] and the blind-spot to which his thought was consequently doomed." (Aricó, 2014: 48, original emphasis) His emphasis on the 'political' is aimed here at identifying Bonapartism as a particular form of political construction in which the revolutionary course takes the route of a process 'from above'. This is the reason for Aricó's qualification of Bolívar's dictatorship as 'educative' and not 'individual'. (cf. 1983: 83) Gramsci's binary (or 'Centaur') category of 'integral state' (i.e., civil society cum political society) is the notion which serves to evaluate the extent to which the strengths of the economic classes are expressed as political will and become embodied in a national state. In revolutions 'from above', a process of revolution-restoration in which the forces of revolt are turned back against the subalterns takes place, something which ultimately gives rise to conservative and regressive state-forms.

Bonapartism and passive revolution are the Gramscian pathways by means of which Marx's inverted Hegelianism – i.e., Marx's refusal to provide the state agency in the formation of a capitalist society – is challenged in Aricó's argument. Privileging the phenomenon of Bonapartism, Aricó proposed to read Latin American processes as characterized by the twofold moment of revolution and restoration. In my view, two important elements are brought into relief in this argument. The first is related to Marx's and Marxists' "resistance" (a Freudian diagnosis, one might say) to take into account the potentially active role of the 'superstructures' in the production of the societal 'basis', "and, by extension, of the nation itself." (Aricó, 2014: 60) The second element, more implicit but key in my view, is the extended explanatory scope that Bonapartism achieves in Aricó's discussion, encompassing the entire history of Latin America's 'bourgeois revolutions'. Therefore, passive revolution is regarded not as a single event concentrated in the independence wars, but rather as a series of processes that have seemingly not come to an end –as the phenomena of *Peronismo* and other national-populist experiences prove for Aricó.

In this sense, *Marx and Latin America* finds in Marx a way out from Marx himself, so to speak. In order to release Marxism from its deterministic and evolutionist burdens, the misencounter of Marx and Latin America apparent in 'Bolivar y Ponte' confronts the conception of the political as mere epiphenomenon of economic forces or interests, a conception amounting to a simplistic, instrumental approach to state power. As Cortés (2015: 171) has put it, the subversion of the base-superstructure relation is the standpoint from which Aricó departs from Marx's system and begins the voyage whereby Marxism can come to terms with the periphery. This voyage, conversely, is in my view oriented back into the model of development characteristic of the versions that conceive Marxism as teleology, a philosophy of history. This is suggested by Aricó in his remarks on Russian populism: "backwardness has its virtues [*virtualidades*] [...] if the backward exist, development becomes questioned." (cited in Cortes, 2015: 159)

Backwardness, in other words, becomes for Aricó the epistemological touchstone of the model of history held by official Marxism. In doing so, he went beyond the conceptual horizon sustained by modernization theory and Stalinism alike – and that, as we demonstrated in chapter IV of this thesis, was markedly

shared by the dependency school. Conversely, it signalled a potential exit from the Marxist theoretical and political crisis. What the misencounter of Marx and Latin America demonstrates, in other words, is the collapse of that developmental model *tout court*, and of its economic determinism in the first place. As I will attempt to argue in what follows, this is at the heart of the theoretical intervention that *Marx and Latin America* sought to perform in the midst of the 'crisis of Marxism'.

### 3. The Crisis of Marxism Approached Through a Latin American Lens

#### *Contours of the Crisis: A Trans-Atlantic Debate*

As noted above, Aricó considered the work of translation as a pathway to both dialoguing with, and potentially integrating of, important aspects of contemporary culture for the sake of the invigoration of historical materialism's critical apparatus. In a manner similar to Gramsci, the Argentinean Marxist understood this work in its double register: of translation between philosophical or specialized languages, on the one hand, and between national cultures and their particular linguistic bodies, on the other – that is, of *linguaggio* and *lingua*, in Fabio Frosini's (2010: 178) rendering of Gramsci's distinction.

A translation, nonetheless, is a kind of work that always brings something new out of its procedure. Aricó's analysis of the misencounter between Marx and Latin America, and the mistranslations it has produced, makes it possible a re-reading of Marxism in a way entirely different from a philosophy of history. The destabilization of the translational regime established as 'official Marxism' – for which economic development, the working-class formation, and the achievement of class consciousness follow the lines of a pre-determined trajectory – indicates both the pitfalls of this narrative, as well as it opens the consideration towards other, subterranean Marxisms. As it was stated in the passage which serves as epigraph of this chapter, for Aricó

[j]ust as the history of the Church is not identical to the history of Christianity and does not wholly define its boundaries, the history of Marxism is rather more than the vicissitudes of the vulgate and the

‘deviations’ from it. Apart from its specific history as an institution and as a dogma, the history of ideas and intellectuals, it is undeniable that it also has another discontinuous and decentred history, full of hidden expressions, lost paths and diverse temporalities; an esoteric and pluralist history expressing the multiplicity of initiatives, goals and results of the struggle waged by the subaltern classes. (2014: 119)

The misencounter and mistranslation of Marxist conceptual apparatus into Latin America is traced against the grain of its canonical philosophical edifice, thereby disclosing alternative paths through which varieties of Marxism have attempted to coming to terms with Latin America in its concrete actuality. By means of providing these alternative, subterranean, seemingly ‘lost’ paths to contrast the alleged universality of official Marxism, Aricó suggest that a Latin American perspective can participate in its own right in the necessary reconstruction of Marxism in the midst of its theoretical-political crisis.

It is important to consider here the connection of *Marx and Latin America* with the contemporary debates aroused during the late-1970s under the label of ‘crisis of Marxism’, to the extent that the following remarks made by Aricó about Marx might be fairly applied to his own method: “Marx’s questioning historicism, and his consequent inversion of the nexus between past and present necessarily presupposed subordinating history itself to the ‘historical time’ of the given social formation, which in turn implied reconstructing history on the basis of the *systematic character* of the present.” (2014: 42, original emphasis) Applied to Marxism (grasped as theory intending to go hand-to-hand with the movement of the real), such a methodological-critical orientation allows to go beyond these official registers in which theory has become trapped.

This method, in turns, help to disclose discontinuous and decentred histories: “Marxism as something historical and worldly” – Aricó stresses – “must be seen in the secular history of its ‘reconstructions’ – we might also say, ‘productions’ – that, as such, were something more than ‘interpretations’” (2014: 119). This was, in my view, the core of Aricó’s intellectual contribution: to disclose the pluralist history of Marxism through an examination of its (productive) ‘reconstructions’ within the history of its ‘reception’ – that is to say, its translations and mistranslations. Aricó

proposes therefore to read Marx, and hence to revitalize Marxism, in terms of a critical, multi-layered, and pluri-temporal perspective on both capitalist development and the revolutionary possibilities derived from it.

In an important sense, *Marx and Latin America* deploys a twofold argument even formally speaking. On the one hand, there is the main argumentative line which analyzes the misencounter between Marx and Latin America already exposed in the previous section of this chapter. On the other, the footnotes and marginal comments made by Aricó go largely beyond the framework of the critical apparatus supporting the main textual body; in it, rather, the Argentinean Marxist presents a parallel consideration about the underpinnings of the conceptions of Marxism held by the Second and Third International. This indication supports the view of Aricó's book as an intervention in the Marxist realm;<sup>89</sup> a realm that was at that time undergoing a profound re-evaluation in the midst of the 'crisis of Marxism'.

As the expression of a will to participate in this theoretical and political crucible, the Argentinean group to which Aricó belonged established their own organ to reflect on the Marxist crisis in their Mexican exile. This was the function of the journal *Controversias*, in which Marxist, socialist, and populist stances met together around the problems imposed by the defeat of left-wing projects throughout Latin America, in both their theoretical and political dimensions. Founded in 1977, *Controversias* counted with the participation of Aricó, Schmucler, Terán, Portantiero, and Del Barco alongside other intellectuals such as Emilio de Ípola and Nicolás Casullo, under the direction of Pío García. Alongside this journal, Aricó continued to publish, preface and introduce contemporary debates in and about Marxism in both the CPyP and Siglo XXI. What is more, he and Portantiero funded in 1981 the editorial-house Folios, whose series 'The Time of Politics' indicated the important place that political theory held in these critical reflections about Marxism. Apart from Portantiero's influential *Los Usos de Gramsci* (*Uses of Gramsci*, of 1981), Folios edited and published works by Carl Schmitt, Max Weber, Karl Korsch, and Hans Kelsen among other authors somehow alien to the Marxist tradition. Not an insignificant list, as we will see in what follows.

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<sup>89</sup> I owe this useful indication to S. Malecki (2013: 162fn).

The compilation *Discussing the State* ('Discutir el Estado'), published in Folios in 1982, allows an approach to the trans-Atlantic nature of this perspective on the Marxist crisis. The volume was the translation of the '77-'78 *Il Manifesto* debate, which revolved around Althusser's characterization of the 'crisis of Marxism'; it appeared initially in Italy as *Discutere lo Stato*. This debate gathered together important authors of the Italian and French left. 'The Crisis of Marxism has Erupted at Last!' was the heading of Althusser's intervention in the seminar organized in Venice by the Italian independent communist newspaper *Il Manifesto* in November 1977. It was published later as 'The Crisis of Marxism' in the journal *Marxism Today* (1978), and was followed by the article '*Il Marxismo come teoria "finita"*' ('Marxism as a "finite" theory'), also published in *Il Manifesto* in 1978.<sup>90</sup>

These interventions held a common concern: the absence of a Marxist 'theory of the State'. This was a matter already addressed in the Italian debate by liberal-socialist philosopher Norberto Bobbio. But while Bobbio considered that Marxism dismissed altogether the field of politics, of volition into history, asserting that this theory was too obsessed with how to *achieve* power but little with how to deal with it (cf. Bobbio, 1975), Althusser indicated that these theoretical lacunae can be regarded in terms of the open, non-deterministic nature of Marxist theory. (We will return to Bobbio.)

Althusser proposed this line of reasoning in an article that appeared in *Il Manifesto* on 4 April 1978 where he defined Marxism as a 'finite' theory. The French term *fini* can indeed be translated as 'finite' or 'finished', meaning in each case two completely different things. I follow Etienne Balibar's choice for 'finite', that is, "Marxism has an outside, this implies that Marxism is not a form of 'absolute

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<sup>90</sup> The context of the debate is well-known. During the 1970s, the Communist parties of France, Italy and Spain declared the abandonment of the dictatorship of the proletariat as the political goal of the working classes. In Italy the party (the larger organization among these) attempted an alliance with Christian Democracy that was famously called 'historical compromise' by its general secretary Enrico Berlinguer. Largely informed by the defeat of the democratically-elected socialist government of Salvador Allende in Chile in 1973, the contents of this compromise were placed in the defense of democracy and liberty as the only veritable grounds to prosecute of a socialist horizon. 'Eurocommunism' was the label of this programme of adaptation of socialist strategy to the conditions of bourgeois democracy, a name which projected an organic relation between socialism and liberal institutions. Accordingly, some of its ideologues of such as Spanish Ludovio Paramio and José Reverte asserted that the crisis of Marxism had to do with a wrong theory (the dictatorship of the proletariat) derived from a misleadingly political strategy (revolutionary Marxism).

knowing', is not a totality that could ever close in upon itself." (2010: 50) It is finite because it is embedded into the time in which Marx was writing; therefore, it is a theory that, without assessing any eternal truth beyond history, can nonetheless project onto the future tendencies already inscribed in capitalist social relations. In particular, Althusser focuses in the absence of a theory of the state the central element of the crisis: the passage from the critique of political economy to the critique of politics. In this sense, the discussion of the state's theoretical status in Marxist thought is demonstrative of the discontinuous history of relation between the political and the economic, of which the state-apparatus is a condensed outcome and expression. This discontinuity, Althusser concludes, is at the centre of the contemporary crisis, demanding from Marxism a reconsideration of the forms of social reproduction. Therefore, and in contradistinction to Tronti's conclusions about the 'autonomy of the political', Althusser proposes to think in terms of the 'primacy of the political' as a productive route to come to terms with contemporary capitalism.<sup>91</sup>

Similar concerns were present in Latin American debates at that time, as the defeat of left-wing political strategies, with their outcomes in military regimes across the continent, demanded a critical approach to the theoretical pillars that had supported these strategies to begin with. Particularly, the journal *Controversias* (and editorial *Folios*, later on) served as loci for the unfolding of these preoccupations. In one of his contributions to the journal, entitled precisely 'Crisis of Marxism', Aricó outlines the matter in the following terms:

The Marxist tradition dissolved the harsh problem of the state's forms by means of the utopian design of its inexorable 'withering away'. Communists as well as social-democrats ended up leaving aside what actually constitutes the core of the problem, so that without its resolution socialism becomes reduced to wishful-thinking. Without democratic institutions, state capitalism is not socialism's precursor but an unprecedented, heinous dictatorship over the masses; without an actual process of the socialization of property, the social-democratic

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<sup>91</sup> I follow here Sarah Farris's (2013) insightful remarks on the differences between Althusser and Tronti.

project facilitated fascist and neocapitalist responses. (cited in Cortés, 2014: 150)

In this passage, both communists and social-democrats are blamed for the miscomprehension of the relation between democracy and socialism: the latter, because of the neglect of the substantive contents of socialism –namely, the socialization of production; the former, because of the reduction of democracy to a mere bourgeois instrument. In both cases, Aricó's argument posits the focus not only on theory but on politics, in a political project which has been historically rooted in a misleading consideration of the relations between democracy and socialism. A misunderstanding that, as Althusser explained, misses the crucial fact of the constitutive discontinuity between economy and politics.

*The Crisis Translated Back: Aricó's 'Epilogue' to Marx and Latin America*

The debates and exchanges presented in the previous section provided the grounds for the theoretical intervention proposed in *Marx and Latin America*. These grounds are somewhat implicit in the 1980 first edition, but become fully apparent two years later, with the introduction of an 'Epilogue to the Second Edition'. The 'Epilogue' initiates a dialogue that sets out a counter-argument with Carlos Franco's 1980 'Introduction'. This Peruvian intellectual and editor of the Lima journal *Socialismo y Participación* was at least partially responsible for Aricó's introduction to the debates about Mariátegui that led to the compilation *Mariátegui and the Origins of Latin American Marxism*, published by CPyP in 1979. In 1980, in turn, *Marx and Latin America* will appear in Lima with Franco's 'Introduction'.<sup>92</sup> The 'Introduction' radicalizes Aricó's critiques of Marxism (understood as utterly Eurocentric) in the following terms:

Following [Aricó's] reasoning, the conflict between Latin America and Marxism becomes of theoretical concern when practice draws attention to a *constant misencounter* [*constante desencuentro*], *the two fated to a sharp mutual repulsion*, one that excludes Latin America from Marxism (meaning, reality from theory) and the other which excludes Marxism

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<sup>92</sup> This collaboration will further motivate Franco's work *From Eurocentric to Latin American Marxism* (1981).

from Latin America (meaning, theory from reality). (2014: xxxv–xxxvi, trans. modified, emphasis added)

Given the constant nature of this misencounter, the fact that Aricó's theoretical endeavour was pursued within the boundaries of Marxism remains, for Franco, a mere recourse to identity. A more coherent prosecution of Aricó's line of argument, conversely, would conclude that "we only begin to do Marxism when we abandon the father and run away from the family home; in other words, when we take back or affirm afresh our individual theoretical identity. For Aricó to call this 'Marxism' is, I believe, simply a means of maintaining a symbolic attachment to his origins" (2014: xliii). In what can be considered as an example of what Löwy has characterized as 'Latin American exceptionalism' (1992: xiv), Franco read *Marx and Latin America* as a way out from Marxism, however Aricó's argument proves to be still trapped in an "emotional resistance to any break." (2014: xlix)

The counter-argument to Franco's conclusions appeared in the 1982 'Epilogue'. In it, Aricó emphasizes that Marxism's contemporary validity rests on its critical judgment of capitalism. It is not – and Aricó stresses here his own conclusions, in contradistinction to Franco's – that Marx was Eurocentric but rather 'capitalist-centric'. This is, Marx analyzed first and foremost capitalist society from a viewpoint that, however started to take shape from European reality, was broadened towards a global perspective. Aricó insists that close attention to the 'lost paths' in Marx's work – exhibited, as we saw, in his attention to both uneven capitalist development and the autonomy of the political – prevent the projection of Marxism as a closed system. In this sense, the Argentinean author borrows Althusser's description of a 'finite' theory as an antidote against any belief in Marxism as a 'finished' one, that is, against its ecclesiastic dogmatization. This consideration, Aricó goes on, is "itself a means of shifting reasoning from the level of faith onto that of critique", which is in turn a way to keep reasoning within the horizon opened by Marx. Aricó proposes in consequence a work *internal* to Marxist theory in order to release it from the status of dogma: "[o]ccupying the terrain of Marx's fundamental outlook – that is to say, being 'within' it – today requires going 'beyond' him." (2014: 125, 127)

Althusser's idea of 'finite' theory further serves Aricó to dig into the more urgent problems that haunt Marxism, on the condition that these limits, blind-spots, or 'lost paths' are inverted into 'departure points'. This is the case of the topic that dominated the debates on the crisis of Marxism: the extent to which a non-authoritarian political theory can be derived from a coherent Marxist framework. As I discussed in the previous section, the finite nature of the theory was concluded by Althusser from the absence of a theory of the state, giving rise to a re-consideration of the discontinuous character of the relations between the economic and the political, that is, a new turn on the problem of social reproduction.

Accordingly, the 'Epilogue' deploys an argument in which the problem of the political for Marxism is qualified by arguments of Mario Tronti, Giacomo Marramao, Norberto Bobbio, and Nicola Auciello – that is, some of the most prominent authors in the *Il Manifesto* debate. Drawing upon Tronti's ideas on the autonomization of the politics, Aricó sees in the antithesis between socialization of the production and reduction of working-time an invitation to think politically the contemporary crisis, from the viewpoint of the "different rhythm of development between the political and the social", and the acknowledge of the "specificity of the political cycle" vis-à-vis the economic cycle (Tronti, *Sull' autonomia del politico*, cited in Farris, 2013: 189). Consider this passage as an example of Aricó's argument:

The commodity, the objectification of a social relation, explodes, [...] ceases to be a real synthesis [...] and labour power becomes free living labour. Capitalist dominion, then, would have to re-establish its power on another footing, outside of the 'economic' relation represented by capital, but the 'crisis of governance' entailed in such a period would reveal the insuperable obstacles posed by the non-assimilability of subjectivities separated from the social in this systemic synthesis. (2014: 128)

This rather opaque passage indicates, in my view, at least three elements worth considering here: first, the claim of the end of the commodity-form as the real synthesis of the social; second, the concomitant attenuation, or diminishing in importance, of the determination of the economic 'in the last instance'; and third, the crisis of governance generated by unleashed forms of subjectivity that what Aricó

calls the 'explosion' of the commodity-form has brought about. The passage sounds like post-Marxism *avant la lettre*, if it were not for the fact that Aricó's insistence about a reconstruction underwent through Marx's theoretical horizon. The epoch-making transformations of social reproduction identified in Althusser's and Tronti's arguments, in consequence, release politics from both economic determinism and its dependence from major classes upon it.

For Aricó, Marx's last, fragmentary writings (either unknown or disdained by twentieth-century Marxism now in crisis already) already displayed a consideration of the primacy of the political. Oscar del Barco (1982) had already given an account of the asymmetrical character of the theoretical object 'capital' in his remarks on the fragmentary and of necessity 'finite' nature of Marx's work after *Capital, Vol. I*. Aricó followed a similar line of reasoning, distinguishing in Marx, on the one hand, the systematic effort to give a theoretical – hence necessarily abstract – account of capital's determinations at the level of the mode of production; and, on the other, the Marx of the concrete analyses which are premised by the standpoint of the primacy of revolution – of the political, in Aricó's view.<sup>93</sup> What seems 'anomalous' at the mode of production level becomes a matter of politics, of inter-state and international relations of forces when posited at the level of socio-economic formation.

And nonetheless, in a Schmittian fashion with owes more to Tronti than to Althusser, Aricó's line of reasoning seems to follow the path from an overestimation of Bonapartism to determination of the economic by the political. In his own words, the political "now struggles in a confused manner to extend itself and to embrace a multiplicity of social subjects who have proven irreducible to the traditional forms of tutelage exercised by the prevalent institutional structures." (2014: 127) It was in this precise sense that Aricó praised Carl Schmitt, as one of Marx's disciples, insofar as "Schmitt is situated in the total acknowledgment of what characterizes for us the epoch-making contribution produced by Marx: the essentially political

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<sup>93</sup> On the political, revolutionary Marx, Aricó argues that "[t]he framework of his thought was not, then, a consideration of the progressive character of capitalism, but rather the possibility of revolution that it might bring about. Revolution is the site – is it really a 'site'?; perhaps we might better, if ambiguously, say the 'point', to avoid running the risk of the word having a 'geographical' connotation– from which he characterizes the 'modernity' or 'backwardness' of the movements of the real." (2014: 141).

determination of economy.” (1984: x) From these considerations, Aricó suggests that the ‘political Marx’ (who is the Marx of the ‘lost paths’) envisaged that “[t]he ‘time of capital’ [*tiempo del capital*] was clearly distinct and not superimposed on ‘the time of societies’ [*tiempo del las sociedades*]; as such, an explanation of the slow pace and complexity of the spread of the capitalist mode of production had to be located on the terrain of politics” (2014: 137, transl. modified). This passage makes clear evidence of the debt of Aricó to Tronti – a long-lasting debt, if one takes into account the early *Operaism* as well as the late Schmittian framework.

#### **4. A Marxism of Pure Politics? Critical Conclusions**

From the above outlined perspective, Aricó nourished the crisis of Marxism with the conclusions of *Marxism and Latin America*, in what might be considered as a sort of corroboration of the ‘virtues of the backward’ at the level of theory. The alleged backwardness of peripheral societies (that is, their non-synchronicity to the capitalist now, or the denial of coevalness) puts into evidence the opacity existing from the outset between capitalist economy and bourgeois politics. As the contemporary contours of the ‘crisis of governance’ unleashed by new forms of social reproduction makes apparent – Aricó concludes –, this opacity also affects those ‘advanced’ or ‘mature’ societies. The symptomatic reading of ‘Bolívar y Ponte’, the reading of the silences and lacunae that the text evidences when contrasted with the rest of Marx’s ‘fragmentary’ work, is indicative of the demonstrated incapacity of Marxist thought to come to terms with both the discontinuity between economy and politics and the resulting unbalanced relationship between socialism and democracy. In doing so, the actuality of peripheral capitalism is channelled so as to confront official Marxism to the point of questioning the narrative of capitalist ‘progress’ altogether, extricating hence Marxism from its coagulation into another philosophy of history.

Therefore, the apparent ‘anomaly’ that Latin America has exhibited within Marxist reflections is turned upside down and situated at the centre of Marxism’s contemporary crisis. Informed by Althusser’s idea of ‘finite theory’ – and the ‘lost paths’ this condition necessarily entailed in the work of the German thinker –, in Aricó’s account the constant mistranslation displayed by Marx and Marxism

rendering Latin America becomes indicative of important, non- or ill-resolved issues that haunt Marxist theory *tout court*. We must understand in this sense his insistence on the necessity of coming to terms with the misencounter of Marx and Latin America – understood as a theoretical (mis)event – in *political* terms: once unveiled, the ‘political’ kernel of the misencounter further enlightens the nature of the current crisis in both its actual contours (crisis of governance; new subjectivities exceeding class divisions) and the demands it poses over Marxism as a secular – non-dogmatic, that is – and politically-oriented critique of capital’s actuality.

Nonetheless, a more critical reading of Aricó’s version of Marxism must focus on the increasing conflation displayed in his late years between the arguments about Marxism’s lack of state theory, the autonomy of the political, and his own adoption of liberal arguments. From his return to Buenos Aires in 1984, Aricó’s concerns revolved around a conception of hegemony able to come to terms with democracy. The latter, in turn, was a notion whose formal, liberal aspects were more and more apparent in his writings (cf. Gago and Sztulwark, 2015). Aricó’s intellectual trajectory can be depicted as the passage from a (previously Leninist) Gramscian conception about the organic unity of society and politics to a purely political conception of both politics and the state. In doing so, *Marx and Latin America’s* emphasis on the neglect of the political displayed by Marxist accounts on Latin America presages the turning into a liberal concept of democracy, once that populism was not the order of the day. Once the explanation is posed on the diminished capacity of the dominant classes to build an organic society, the state-action becomes the explanatory fact marking the difference between European and Latin American developmental roads.

Álvaro García Linera says in this regard that Marx’s incomprehension of Latin America rests more on the latter’s actual dynamics of class struggle than on the role assigned to the state in building an organic society – a nation. The lack of indigenous uprisings and visible struggles were significant to this respect, and led him to consider other scenes such as India, Turkey, or Russia. In contradistinction to Aricó, García Linera concludes that “Marx was right, for the nation-state, when is not constructed as social act, as deployment of civil society’s energies as a whole, was and is an authoritarian, irrational, formal construction.” (2009: 66) In this sense, Aricó blurred the central factor of class struggle in his evaluation of Marx’s

dismissive consideration of the state-effect, which led him to overestimate the historical function of the state – and arguably channelled his late defence of liberal democratic in a context of neo-liberal counter-reforms.

By and large the direct consequence of military rules in Latin America, neoliberal counter-reforms were the road for which David Harvey calls the “restoration of class power” (2005, ch. I). In an extremely violent fashion, the policies later crystallized in the Washington consensus established newer, more flexible forms of capital’s accumulation and reproduction, organizing also the political realm for the sake of capital. These transformations in both forms of accumulation and institutional dispositions have of course impacted on the material and existential forms of subjectivity of the subaltern classes, devoid of the power achieved in the ISI period, eliminating hence the historical basis of national-populism. Harvey argument, of course, remains at the antipodes of Aricó’s understanding of the democratic turn opened up in the 1980s, insofar as it the latter utterly stopped reflecting in terms on political economy and class analysis. In a context in which the aftermaths of the military dictatorships, the prospects of a non-authoritarian Marxism, and the first manifestations of the neoliberal reorganization of power came almost simultaneously into view, the adoption of democracy in its more formal meaning was a hallmark of many of leftist intellectuals of the time in Latin America (cf. Rollemberg, 1999; see also Couto, 2016).<sup>94</sup> As Miguel Valderrama (1998) suggests in this sense, Althusser’s lesson to Latin America produced a sort of belated ground for post-Marxism, of what the best example is, no doubt, Ernesto Laclau.<sup>95</sup>

One might contend Aricó’s argument from a different standpoint. Following Fredric Jameson, it is possible to argue that the lack of an explicit political theory constitutes not a weakness but one of Marxism’s virtues. In Jameson’s argument, the political theory allegedly required is premised by the assumption of a relative

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<sup>94</sup> Among the intellectuals who followed the routes of the ‘socialist renovation’ in the sub-continent, one may count Norbert Lechner, Beatriz Sarlo, Roger Bartra, Carlos N. Coutinho, José Joaquín Brunner, Juan Carlos Portantiero, and the same Aricó among many others.

<sup>95</sup> A scholarly research devoted to the convergences between these Argentinean Marxists is still lacking. No doubt, the massive coincidence in the Italian sources informing their political conceptions, from Gramsci to Bobbio, plays a role in the appreciation of confluent pathways.

autonomy of the political and of the state. However, the fact that capital is and has been so imbricated in the state apparatus makes it difficult, almost impossible, and in any event futile to hold a political theory of such a nature. Jameson concludes taxatively saying that “political theory as such has become extinct in capitalism” and in consequence “the absence of a political dimension from Marxism – its radical disjunction of ‘economics’ (to use that word in a very loose and general way) from politics – is one of its great and original strengths.” (2011: 141)

Drawing upon Harvey’s and Jameson’s arguments, I consider the restoration of class power deployed during the late-1970s and ‘80s by neoliberalization processes of politically-aid marketization of societies (first in Latin America, then elsewhere) as part of the evidence of this pervasive subsumption of the state and its institutions by capital’s logic. In consequence, the theoretical encounter of democracy and socialism required a deeper reevaluation of both terms, so as to distinguish a democracy-for-capital from another, post-capitalist form of democracy. (As we will see in next chapter, this was also one of the *leitmotifs* for another Latin American Marxist, Bolivian René Zavaleta Mercado). Aricó’s final engagement with a liberal conception of democracy might be considered as the consequence of a missed translation: the missed consideration of the concrete process in which Argentina’s infrastructures of struggles, working-class forces, and productive-reproductive relations were transformed during the neoliberal dictatorship-democracy continuum. In other words, the critique of the unilineal regime of translation established by Stalinism, qualified as a philosophy of history, was thus replaced by a liberal-democratic language within Marxism, a replacement without translational mediation.

Perhaps ‘symptomatic’ of this displacement is Aricó’s citation of Gramsci in the final section of *The Devil’s Tale* (a quasi-autobiographical essay about the function of the Italian Marxist in Latin America). In it, we read: “Being the state [in peripheral countries] the concrete form of a productive world [...] it is typical of intellectuals not anchored to a powerful economic group to present the state as an absolute.” (Gramsci, cited in Aricó, 1988: 99) Arguably, Aricó’s overemphasis on formal democracy was derived (once again?) from the absence of a political subject able to counteract the capitalist restoration carried on in Latin America under the name of neoliberalism, which in turn provoked the (idealist?) notion that bourgeois

democracy could set the minimum grounds for the emergence of such socialist project. Aricó's brief but significant role as advisor of the recently-elected President Raúl Alfonsín (a Radical politician, aligned with anti-populist policies and hence at the antipodes of *Peronismo*), as well as his final disillusionment with political affairs, are perhaps indicative of the void in the middle of which Aricó's Marxism navigated in his late years.

To conclude these final remarks, we might say that Aricó participated in a sui generis manner of the subalternist hypothesis outlined in this research. First, he brings to the forefront the destabilization of a generalized notion of development shared by bourgeois and orthodox Marxist conceptions alike. By means of a reading of Marx's fragmentary works in which the perspective of uneven and combined development is put at the centre of revolutionary socialism, Aricó found the possibility of a more productive encounter of Marxism and Latin America: a Marxism with no guarantees, not the custodian of any ultimate truth, but rather a politically-oriented critical method of capital and capitalism first and foremost. Second, the relative 'autonomy of the national' outlined before by Lenin, Gramsci and Mariátegui was incorporated in Aricó's thought through the arguments that qualified the late-1970s' 'crisis of Marxism', particularly from the Italian debate of the time – that is, in the register of the 'autonomy of the political'. Along the lines of the drifts that characterized the processes of socialist renovation (liberalization, that is) occurred throughout the sub-continent in the 1980s, this register derived into a non-critical adoption of the liberal concept of democracy, a conceptual gesture that ended up leaving unquestioned the (capitalist) nature of the state, the new forms of subalternization driven by neoliberalization process, and hence undermining his own theoretical insights.

Last but not least, Aricó's invaluable contributions in the practice of translation of a significant part of the Marxist debates must be recognized nonetheless. In a theoretical level, the main outcome of his translational exercises was the projection of Latin America as a permanent (however discredited) participant of the Marxist crisis. Conversely, in the 1982 'Epilogue' to *Marx and Latin America*, Aricó situates his book in the essayist tradition of the region. In doing so, he was bringing to the forefront a dense, complex heritage in which the problem of the region's identity has been traversed by the question about Latin America's

possibilities for cultural autonomy. This encounter of Latin America's participation in the crisis' debates, on the one hand, and of the quests for the achievement of a regional, identifiable cultural character, on the other, envisages in my view the question about the forms and conditions for making theory in Latin America. The crux of the translational exercise, the hypothetical incommensurability of Marxism and Latin America turns out to be a response and hence an intervention within the Marxist realm undergoing its own theoretical-political crisis. I suggest that this response, if not satisfactory, is at least indicative of an attempt to outline the uneven and combined pathways through which Marxist theorizations unfold and develop.

## VI. Crisis as Method: Zavaleta and the Real Subsumption of Marxism in Bolivia

'The critical knowledge of society is therefore a consequence of the manner in which things happen. This should be this way every time; the nature of matter should determine the nature of its knowledge, the manner in which society defines its line of knowledge. Meanwhile, the pretention of a universal grammar applicable to diverse formations is but a dogmatization.'

René Zavaleta Mercado,  
'Masses in November', 1983

'Knowing, in any case, is not a mere conceptual composition: it is a vital act, an abrasion [*desgaste*] and, in consequence, a hazardous business, an act of organization.'

René Zavaleta Mercado,  
'The Apparent Formations in Marx', 1978

### 1. From Nationalism to Marxism

Mexican hospitality for political and intellectual exiles also sheltered Bolivian politician and sociologist René Zavaleta Mercado (1935-1984), who moved to Mexico City in 1973. Zavaleta's trajectory was that of a nationalist-become-Marxist. Indeed, in his youth he formed part of the Nationalist Revolutionary Movement party (Movimiento Nacionalista Revolucionario, MNR). The MNR led the 1952 Bolivian revolution; however, that event was more a grassroots mass movement than a top-down overthrow - in this sense, it is akin to the Mexican revolution. As a consequence, Bolivia underwent during the 1950s an agrarian reform, an education reform, the nationalization of mines and other strategic resources, the decree of universal suffrage, and the reform of the national army, among other important transformations. Having studied laws, Zavaleta became part of the Bolivian diplomatic body in Uruguay, and his political drive pushed him, first, to be elected as national deputy at the age of 24, and later to assume the ministerial post of Secretary of Mining at his 27. Zavaleta's political thought in this period was marked

by a mixture of economic industrialism and cultural nationalism (cf. Tapia, 2002, ch. 1 to 4). The MNR held power until Barrientos's 1964 military coup, an event that led Zavaleta to a series of exiles, the first of them in Montevideo. Later on, the coup of right-wing general Hugo Bánzer in Bolivia in 1971 sent him to Santiago de Chile.

There, the Bolivian sociologist became part of CEREN (see chapter IV of this work). With that institution as his base, he took part in the debates about the prospects of the 'Chilean road to socialism' along with those that emerged from the dependency school. Pinochet's military coup against Salvador Allende led Zavaleta to a third, eventually definitive exile in Mexico City. In his new host-country, Zavaleta took active part in academic institutions and public debates. In 1974, Siglo XXI published *Dual Power*, acknowledged as his first Marxist work. Begun in Santiago, this book offered an account of the political processes in Chile and Bolivia from the viewpoint of the emergence of proletarian power (we will return to this book in what follows). Furthermore, he founded and was the first dean of FLACSO-Mexico (Latin American Faculty of Social Sciences) and taught at the national university UNAM. He also joined the editorial board of the journal *Cuadernos Políticos* in 1974, a quarterly publication of the publisher Era in which he worked together with Carlos Pereyra, Bolívar Echeverría, Enrique Semo and Ruy Mauro Marini, among other Marxist thinkers.<sup>96</sup> It is relevant to say that *Cuadernos Políticos* was founded with the explicit aim of filling the gap provoked by the closure of many of the leftist journals in Latin America. In parallel, Zavaleta started two journals in 1981: *Bases* ('Bases: Expressions of Bolivian Marxist Thought'), devoted - as its name indicates - to Bolivian discussions, and *Ensayos* (together with Ecuadorian-Mexican philosopher Bolívar Echeverría), dedicated to political, economical and historical debates in general.

Still poorly known in global Marxist debates, and even not much worked on in Latin America, Zavaleta's thought is in my view an important chapter in Latin American Marxism for a number of reasons. First, his reflections encompass the most significant topics of the period, from nationalism to dependence, from populism to democracy, and from the value of historical materialism to the crisis of Marxism. Second, and related to this, I argue that the trajectory of Zavaleta's

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<sup>96</sup> Like Siglo XXI, Era was a project founded in 1960 by left-wing intellectuals, many of them the children of Spanish-born exiles, led by siblings Neus, Jordi and Quico Espresate.

political imaginary provides a pathway for coming to terms with the emergence of indigeneity as a factor of both Bolivia's class struggle and its hetero-temporality, something that might in turn be extended to other Latin American realities. This pathway, finally, is comprised in what is perhaps his more valuable contribution, namely the category of *sociedad abigarrada*, motley or disjointed society. Therefore, since his work is still poorly known even in Spanish literature – let alone in English –<sup>97</sup> this chapter will assume a more reconstructive method, seeking to introduce the main underpinnings of Zavaleta's political imaginary as well as to illuminate its pertinence to some contemporary processes. As I hope this reconstruction helps grasp, the notion of 'motley societies' provides a useful antidote against the contemporary reification of multi-cultural as well as pluri-cultural policies, be it sustained by neo-liberal or left-wing progressive stances.

## 2. Capitalism and Knowledge

### *The Crisis of Marxism Revisited*

In 1983, Zavaleta addressed a salutation to the then-recently established Partido Socialista Unificado de Mexico, the fusion of the traditional Mexican Communist Party and other socialist groups, slightly inclined to Eurocommunist stances. The author offered a view on the much-discussed 'crisis of Marxism', with a particular focus on the question of democracy. The crisis is considered here as a dimension intrinsic to Marxism. For, insofar as it deals with the 'critical' nature of capitalist societies, the status of crisis belongs to its very movement, not to any particular moment or event. Accordingly, it is misleading to talk about the 'crisis' of something has existed but critically. (Zavaleta, 2013a: 608) In a similar same vein, Jameson (1996) has stressed the intrinsic relation of capitalism's inherent contradictions and crises and Marxism as its 'critical' science.

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<sup>97</sup> See, however, Zavaleta's article translated for *New Left Review* (Zavaleta, 1972); see also Susana Draper (n/d), and Anne Freeland (2014a, 2014b). Freeland's translation of Zavaleta's *Towards a History of the National-Popular in Bolivia* is announced by Seagull Books for early-2017.

This, however, is not a way to dismiss the problem: as we will see, the relation of crisis and knowledge played an important role in, and channelled, the more significant contributions of Zavaleta's Marxism. Tellingly, Zavaleta entitled the article as 'Aproximaciones a Marx: ni piedra filosofal ni suma feliz' ('Approaches to Marx: neither philosopher's stone nor happy sum'), a indication of which was his conception of Marxism, different from both a template-method for the explanation of any phenomenon and a prediction about the forthcoming resolution of social contradictions. In contradistinction to Althusser's definition of the crisis, in Zavaleta's terms it is not the product of Marx's theoretical voids, but of subsequent misunderstandings about the relation between the law of value and the forms of intersubjectivity produced by capitalism. As we will see, this consideration was crucial in the formation of Zavaleta's Marxism. Contesting the consideration of Marx's contributions as futile for political theory, Zavaleta asserted in this article that the topic of 'democracy' cannot be adequately grasped without the scientific method provided by Marx. On the contrary, Marx opened what the author calls the "horizon of knowability" (2013a: 606) of modern - i.e., capitalist - times.

These concerns began to emerge from the very moment in which Zavaleta became engaged with Marxist reflections, namely in *Dual Power*. The appearance of the expression 'motley society' (*sociedad abigarrada*) in that book is particularly indicative in this respect.<sup>98</sup> As Luis Tapia (2002: 121-28) points out, *Dual Power* - which marked Zavaleta's definitive incorporation into Marxism - brings forth three of the ideas that will heretofore be constant in his discourse. First, the definition of the law of value as Marx's fundamental theoretical contribution for the critique of capitalism, however not a self-sufficient mastercode as we will see. Second, the characterization of Bolivia as 'motley society'. And, finally, the idea of 'accumulation at the heart of the class' [*acumulación en el seno de la clase*] as a processual descriptor of class consciousness. What follows shall provide a general account of these concepts and of the reflective process through which they were produced, so as to evaluate the contributions they offer in the development of Latin American Marxism's subalternist hypothesis.

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<sup>98</sup> This book was started in Chile in 1972, and finished in Mexico, where it was published first in 1974 as *Dual Power in Latin America: Studies on the Cases of Chile and Bolivia*, and later in 1979 as *Dual Power: Problems of the Theory of State in Latin America*. These shifts seem an indication of the work-in-progress nature of these reflections.

In a still unpublished article, Susana Draper offers an insightful reading of *Dual Power*. She reminds us that, at the time when Zavaleta was working on it, there existed a marked gap between the profuse manner in which the idea was used in political discourses of the left, particularly Marxist ones, and the lack of a deeper conceptualization on the topic, transcending the mere compilation of passages and fragments from Lenin or Trotsky. As Zavaleta understood it, the questions posed by dual power remain crucial for revolutionary Marxism, insofar as they deal with the transition from one kind of 'state' - the bourgeois one - to the proletarian 'non-state state', to use Lenin's formulation, which is also adopted by Zavaleta. In Draper's view, the text "places us before a narrative that incites ways of both imagining the 'passage' to another form of government and reflecting on their failure to do so." (n/d) If we follow her argumentative line, this failure is provoked by the very categories Zavaleta took rather for granted, first and foremost those of proletariat and class consciousness, a failure that disturbs the seemingly linear temporality involved in the transition evaluated. Let us see this in more detail.

From the beginning, the book describes dual power - which Zavaleta prefers to call 'duality of powers' - as a "Marxist metaphor" (1977: 18ff) indicating an anomalous situation: the existence of the incommensurable and antagonizing powers of the capitalist state, on the one hand, and an emerging social force (the proletariat) building its own forms of self-government, on the other. This anomaly is expression of the challenge to the state-power's unity in situations of duality of power. And yet the metaphorical nature of the idea is indeed indicative of the difficulties in coming to terms with the phenomenon in a forthright manner. Referring to the Russian revolution, Zavaleta points out in *Dual Power's* Prologue the temporal dimension of this difficulty: "the duality of powers consists in that what should have occurred successively occurs instead in a parallel manner, in an abnormal way; it is the qualitative contemporaneousness of what came before and after." (1977: 22) The duality of the actual and the emergent then comes to disturb what would otherwise be a simple transposition of state-phases. Pointing out the coeval nature of allegedly sequential

Dealing with Trotsky's general theory of dual power, the author argues that there is no linear connection between base and superstructure, that is, the existence of a capitalist mode of production does not imply a particular superstructural formation, e.g., formal democracy. Instead, the connections between base and superstructure are relative and depend on concrete historical conditions. It is within the considerations about national unity that the adjective of 'motley' appears:

[T]he longer the delay in the formation of national unity, the greater the possibilities for leftovers or hangovers, although they remain relatively isolated and subsist beneath a dominant mode of production. In this sense, *it is true that all states possess a kind of duality of powers within them, and not only during critical periods. The circumstance of pre-revolutionary crisis will do nothing but make the essential doubling of these kinds of motley States proliferate.*

The duality of powers conceived as such is utterly linked to the national question and, in this way, corresponds as much to Trotsky's observations as to Gramsci's. (1977: 75-6, emphasis added)

From a perspective in which no theory of the state is possible, but only partial, concrete accounts of the aggregation between structures and superstructures, 'motley' societies are described as lacking national integration: drawing upon Gramsci, Zavaleta further contrasts it to 'integral states'. Yet, in the same breath, the situation of duality of power is extrapolated to the 'normal' functioning of *any* state. Therefore, the extension of the condition of duality of power to every capitalist society, central or peripheral, projects the temporal entanglement as a permanent (if surreptitious) conditioning factor of class struggle - a factor present even at moments of alleged normality.

*The Model of Regularity and the Proletarian Standpoint of Knowledge*

The brief article 'Crisis and Knowledge', written in 1975 (immediately after *Dual Power's* first edition, that is), continues these reflections but in new registers. Let me first give a rough outline of its contents, so as to then explore them more carefully. The article assumes a viewpoint similar to Lukàcs's *History and Class Consciousness*,

particularly in the consideration of the proletariat as the ‘Archimedean point’ of knowledge-transformation. In Zavaleta’s words, the proletariat “cannot know itself without knowing society in its entirety”.<sup>99</sup> Now, the epistemological question addressed in the article is: What is the ‘margin of knowledge’ [*márgen de conocimiento*] in a ‘backward’ society? The premise of this question is the consideration that a society can know itself only to the extent that it can totalize itself, that is, inasmuch as its core law of motion reaches and penetrates society altogether. In this sense, capitalism is the condition of modern social knowledge, and Marxism becomes the “scientific utilization” [*explotación científica*] of capitalism’s “horizon of visibility”. The proletariat is the only class capable to come to terms with such a horizon, since the bourgeoisie is prevented from doing so by its “ideological compulsion” (2013b: 384–85), something that resonates with Lukàcs’ ‘antinomies of bourgeois reason’. The capitalist horizon of knowability or visibility must be here understood as the making manifest of the inherently contradictory structuring of social relations under capital’s logic, which is in turn the point where, in Lukàcs’s view, bourgeois thought regresses and becomes distorted, ideological.

Zavaleta seems to follow a rather simplistic script to explain the manner in which the working class accesses this epochal horizon. However, in the intermingling of Marxism and the working class standpoint things become more complex: “in the subsumption of scientific socialism [...] to the concrete reality of a socio-economic formation which is capitalist only hegemonically and sometimes upholds the capitalist mode of production but as an enclave, one stumbles into a number of obstacles.” (2013b: 388) In this sentence, and by means of the sui generis formula of ‘subsumption of Marxism’, the author brings to the fore the question of the conditions of possibility for the encounter of Marxist theory and the historical subject in motley, non-capitalistically totalized societies.

The premises of this question are formulated in a more patient way in the text ‘Apparent Formations in Marx’, from 1978. Here, Zavaleta asserts that “the

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<sup>99</sup> Zavaleta (2013b: 389). Lukàcs asserted in his influential 1923 book that “‘criticism’ advanced from the standpoint of class is criticism from a total point of view and hence it provides the dialectical unity of theory and practice. In dialectical unity it is at once cause and effect, mirror and motor of the historical and dialectical process. The proletariat as the subject of thought in society destroys at one blow the dilemma of impotence: the dilemma created by the pure laws with their fatalism and by the ethics of pure intentions.” (1971: 39)

simultaneity of base and superstructure is the central fact of social knowledge” (2013f: 428) within capitalism. This should not be understood as a transparent, merely expressive or mirroring relationship. The idea of a model of regularity is the conceptual tool by which the Bolivian theorist explains the contrast between base and superstructure:

[T]he model of regularity we call mode of production is what expresses the unity of world history (what is comparable), while superstructures mark [...] its structural heterogeneity. (2013d: 429-30)

By model of regularity Zavaleta understands the level of the general, abstract and abstracting rule of the law of value – the ‘normal’, ‘ideal’, or ‘average’ occurrence of capitalism (2013f: 436; cf. Marx 1976: 90). The homogenization that transpires from the terms ‘comparability’ and ‘regularity’ contrasts with the heterogeneity of superstructural forms. Furthermore, and insofar as the superstructures have a particular manner of “causal aggregation” – in the sense that they do not coincide with the ‘regularity’ of the mode of production – the connection or simultaneity of base and superstructure must be understood as “deferred”. The Spanish term used by Zavaleta is *correspondencia diferida*, ‘deferred connection’, indicating both a diachronic delay and a synchronic incongruence or mismatch (2013f: 429, 430). We will return shortly to this point.

Reformulating the assertions of ‘Class and Knowledge’ we can say that the capitalist mode of production has unified the world, thus providing the terrain of comparability between countries and regions – the ‘model of regularity’ – through the generalization of the law of value. The problem emerges with the consideration of the possibilities of ‘subsumption of scientific socialism’ in conditions where the socio-economic formation evidences only a partial presence of capitalism. There thus appears an epistemological lag that would, at least theoretically, prevent the working class from coming to terms with a scientific comprehension of capitalism, something particularly urgent in the capitalist periphery.

Certainly, the wave of defeats of popular and socialist projects in the region brought Zavaleta to re-consider the pertinence of Marxist theory in these terms; what is more, the locus of the problem was twofold, to the extent that the very capacity of the working class to assimilate Marxism was put into question. In this

sense, Aricó's problem of Marxism's ability to come to terms with Latin America is turned upside down. However, given the acknowledged 'deferred connection' of base and superstructure, the concreteness of social processes have more analytical value than any abstraction, something that comes here in turn to disturb any simplistic answer. For, although one may argue – as Zavaleta remarks – that the formation of the working class is in its general features more or less similar in any situation, nonetheless each of them suffers "its own empirical frustrations." (2013b: 388) The article's final passage is indicative of the conceptual impasse produced through these reflections:

Outside the accumulation at the heart of the working class [*acumulación en el seno de la clase obrera*], the acquisition of the scientific instrument (Marxism) is impossible; consequently, the inward development of this class is also the key to the knowledge of a motley society (2013b: 389).

Zavaleta here opens up more questions than he answers, indicating however the direction that his reflections will follow. What is interesting in these writings is not only the appearance of the categories of motley and class accumulation: as Draper (n/d) acutely notes, what was hitherto considered as a tactical issue, situated at the level of the concrete social formations, becomes now an epistemological problem that lies at the core of Marxism, revealing a destabilization of traditional linear ways of thinking the consciousness of the working class.

### **3. *Lo Abigarrado: Subsumption and Temporalities in Motley Societies***

#### *Lurking Beneath the Nation: Subsumption and State-Time*

In the writings that followed *Dual Power*, Zavaleta's arguments seemed to be more and more in necessity of an auxiliary conceptual apparatus to come to terms with the intertwined problem of the temporality of power and the kind of social knowledge attainable by a working class of the capitalist periphery. This is arguably derived from the haunting presence of the 'national problem' in his Marxism. Indeed, the nation constituted the central element of his pre-Marxist political imaginary (cf. Tapia, 2002, ch. I - IV). Accordingly, as in Aricó's case, it seems to me

that the 'national question' worked as an antidote to the simple image of Marxism as a ready-made general theory of the economic determination of the political. Conversely, Zavaleta's early conviction regarding the actual existence of a national substratum mutated altogether with his adoption of historical materialism. In particular, Zavaleta's reflections on the autonomy of the political, the logics of formal and real subsumption in the processes of national formation, and what he called 'apparent states', become crucial to conceptually determine the category of 'motley society'.

The remarks on the autonomy of the political appear in Zavaleta's thought premised by reflections on Marx and Gramsci, but also on Weber, Habermas and Foucault. In what might be regarded as a *sui generis* mixture (perhaps itself a mark of the uneven and combined nature of Zavaleta's own Marxism), the presence of these non-Marxist authors suggests the difficulties of dealing with the 'national state' *from a peripheral region and within* Marxism. Let us consider this long passage, in which the idea of 'constitutive moment' is conveyed:

A typical constitutive moment is, no doubt, primitive accumulation. We must distinguish at least three stages in it. First, the massive production of detached men [sic], that is, of legally equal individuals, the negative or estrangement [*extrañamiento*] moment of accumulation which means the [production of a] hollowing-out [*vaciamiento*] or status of availability. Later, the time of formal subsumption, which is the actual subordination of labour into capital. Here is where interpellation can take place, that is, the suppression of the hollowing-out [moment] from a determinate viewpoint or character. No doubt, this is the moment of the state's foundation. Third, real subsumption, or the application of the conscious gnosis as well as of the masses' power – and other high-quality powers – to the previous factors: capital as effective command and free men [sic] in a mass-status. (2013d: 620)

In this passage, taken from the 1984 article 'The State in Latin America', Zavaleta departs from Marx's 'so-called primitive accumulation', the constitutive moment in which prior modes of production, ways of worlding and worldviews are dismantled, provoking both a situation of detachment and a concomitant

“ideological vacancy” or availability. The replacement of the previous forms of subjectivity is itself a crucial part of the constitutive moment of a society, indicating the ability of the bourgeoisie to “interpellate” – a term that Zavaleta borrows from Althusser (cf. Althusser, 1977) – from its particular standpoint presented as universal. Therefore, real subsumption refers to the ability of this allegedly universal gnosis as ‘effective command’ of individuals homogenized by the law of value, hence indifferentiated in a mass-status.

However, Marx defined formal subsumption as the replacement of the old forms in a movement that may still conserve these forms’ concrete manners of producing.<sup>100</sup> In Zavaleta’s argument, conversely, the importance of this moment lies in the homogenization or equalization of individuals by means of their dispossession, a process that channels them into the new productive regime established under capital’s rule. Drawing upon Weber and Habermas, Zavaleta refers to this process as ‘social democratization’, that is, the interpellation (from a viewpoint which is *in embryo* that of the state) of the population in a situation of detachment and ideological vacancy *as free and equal individuals*. In ‘Four Concepts of Democracy’ (of 1981), Zavaleta describes social democratization as the rule of the ‘logic of the factory’: “The logic of the factory or, if you wish, what Weber calls ‘social democratization’ is, in other terms, what demonstrates the nature of bourgeois democracy. That is: you are free to the extent that you respect – perhaps sanctify – the logic of the factory.” (2013c: 516) The logic of the factory, social democratization, and the subsumption they imply are therefore part of the formal

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<sup>100</sup> In the writing ‘Result of the Immediate Process of Production’ (also known as *Capital’s* unpublished chapter), Marx defines formal subsumption as “the general form of every capitalist process of production; at the same time, however, it can be found as a particular form alongside the specifically capitalist mode of production in its developed form, because although the latter entails the former, converse does not necessarily obtain [i.e. the formal subsumption can be found in the absence of the specifically capitalist mode of production].” (1976: 1019). Patrick Murray explains that “the changes to the production process that Marx identifies with increasing absolute surplus-value involve simply formal subsumption, while those transformations required for relative surplus-value involve real subsumption. Between them, formal subsumption and real subsumption under capital bring about a continual hubbub of social and material revolution [...]” (2004: 246). Commenting on the same passage from *Capital*, Harootunian asserts that “it is also true that Marx envisaged the operation of formal subsumption as an ongoing process, continuing with and alongside the development of capitalism. This predisposition for appropriating what was useful from older modes of production and those at hand conveyed the copresence of primitive accumulation it embodied in some cellular form [...]” (2015: 9).

moment in capitalist totalization, a moment that interpellates individuals as individuals, not yet engaging them in a new collective.

The central objective of the state as a macro-formation is to contain and conduct the population in a situation of legal freedom so that it attends to the realm of production organized by capital. Described elsewhere as “the fruit of the circulation of surplus-value at the heights of the autonomy of the political” (2013f: 454), the state is itself the existence of the ‘collective capitalist’; in turn, its very existence establishes the separation between the society and the political. In a text that Zavaleta knew and likely concurred with, Bolívar Echeverría (1981) indicated that such a division must be understood as the de-politicization of society and economy, on the one hand, and the concomitant politicization of a separate sphere embodying now the ‘representation’ of the whole, on the other. In this sense, Echeverría considered the *res publica* as the ideal or ideological figuration of a capitalist state, as though it were a simple mercantile state. Zavaleta, in turn, evaluates the ‘public’ character of the state thus understood as a feature of its “necessary ideology” – he also calls it the “state’s unconscious” (2013f: 428) – namely, the promise of representing the totality of private owners, beyond particularities or class-situations.

The contrast of formal and real subsumption, which in Marx serves to distinguish an initial, external command upon the working force from a truly, utterly incorporation of labour into capital production and reproduction, allows Zavaleta to differentiate the merely formal organization of productive elements from a truly ‘national’ moment in the formation of a society. In other words, a successful process of nationalization is paralleled to the real subsumption of labour into capital. In a number of writings, the Bolivian Marxist points out that nation itself must be conceived as a productive force, drawing upon Marx’s ruminations made in the *Grundrisse*’s ‘Formen’ (‘Forms which precede capitalist production’). Zavaleta concludes that “[i]t is Marx who recommends to taking into account the collectivity itself as the first productive force” (2013e: 421; cf. Marx, 1973: 471ff). In ‘Notes on the National Question in Latin America’, in turn, he asserts that “insofar as it implies a certain degree of homogeneity among decisive elements attending the productive regime, the nation itself is a productive force or, if you wish, the indicator of the connection between the mode of production and the collectivity in

which it occurs.” (2013j: 539) One might add to this that, if capitalism characterizes itself by improving productive forces, the nation – one of such forces – appears as a higher form of community when compared to previous, local ones.

Following Gramsci, Zavaleta understands the active subject of this process of nationalization in terms of a ‘hegemonic will’ ready to spend a portion of the economic surplus in the building of a separate political sphere. Therefore, a proper bourgeois class is measured, first, by the success in the elimination (or, alternatively, reorientation for capital’s sake) of previous modes of productions, authority, and culture; and second, by the reorganization of power into a realm supposedly existing apart from and over society. To highlight the point, Zavaleta recurs to the idea of ‘optimum state’ (which echoes Gramsci’s ‘integral state’) to describe those associations placed onto fully nationalized civil societies. This optimum state is materialized in a complex set of mediations between ‘political’ and ‘civil’ society.

In what seems a combination of Gramsci and Weber, Zavaleta defines ‘rational bureaucracy’ as of the central among these mediations. Bureaucracy is then the embodiment of the ‘surplus at the level of the political’, fulfilling the role of securing capital’s expanded reproduction. However, Zavaleta indicates a second, more epistemological dimension of this group: to measure or calculate the dynamics of civil society. In the metaphor provided in ‘Four Concepts’, the bureaucracy “listen[s] [...] to the noise of the social corpus” (2013c: 523) with the aim to translate such a noise (i.e. the different languages of class-struggle) into the non-antagonistic, allegedly universal language of the state. What seems to be the epistemological dimension of the bourgeois state, therefore, is the counterpart of the general homogeneization carried through the law of value, the capitalist model of regularity upon which the superstructures find particular concreteness, or what Weber and Habermas denominate ‘rationalization’.<sup>101</sup>

Interestingly, Zavaleta’s argument on the optimum state appears in ‘The State in Latin America’ in contradistinction to the characterization of ‘gelatinous’ societies provided by Gramsci. As Anne Freeland argues, Zavaleta seems to disregard here

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<sup>101</sup> In this sense, Zavaleta thinks the idea of model of regularity (Zavaleta’s concept for the mode of production) in terms of the notion of rationalization and becoming-calculable of modern society, characteristic of the Weberian tradition within Marxist debates from Lukàcs’ *History and Class Consciousness* to Habermas’ *Legitimation Crisis*.

Gramsci's opposition between the West and the East, preferring instead the distinction between 'robust' and 'gelatinous'. Robust national states are those in which a dense system of institutional mediations is established, first and foremost a 'rational bureaucracy' attempting to subsume the dynamics of civil society into a general expression. Gelatinous, on the other hand, means lack of mediations, obscure zones of social legibility or calculability, disaggregated spaces of influence, and different, potentially incompatible interpellations. Freeland (2014b: 296) rightly points out that Zavaleta's use of the adjective 'optimum' is not oriented to contrast Western societies, but rather those 'ossified', traditional forms of sociality that remain non-totalized by capital's logic. In this sense, the opposite from an 'optimum state' is a state built upon a non-combined, merely overlapped aggregation of different modes of production.

With the category of 'apparent state', Zavaleta refers to those cases of nationalization where only a partial subsumption of labour into capital has been accomplished, which means that the state does not 'feel' (or 'listen to', in Zavaleta's metaphor) its components in an organic way.<sup>102</sup> It is a form of state that projects the unity of what is not unified. The non-totalized nature of these formations does not only occur at the level of the mode of productions, but hinders the achievement of the kind of superstructure typical of the capitalist model of regularity, formal democracy. Furthermore, it also contains in a non-combined manner a number of worldviews and structures of temporalization embodied in 'cultures', as the following passage remarks: it is "as though feudalism pertain to one culture and capitalism to another, and nonetheless both happens on the same scene." (2013i: 105) The recourse to the very imprecise idea of culture, in my view, compresses here the variety of ways of worlding, worldviews, and structures of temporalization alien to capital's temporal matrix as well as to its more classical forms of intersubjectivity.

In consequence, an apparent state cannot, or can only partially, claim the universality of its own 'time' insofar as it leaves aside, and is permanently

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<sup>102</sup> Some years before, *Indianista* thinker Fausto Reinaga designated Bolivia as a *nación ficta*, a fictitious or false nation, in his political manifest *La Revolucion India* (1969: 74). See also José Antonio Lucero's 'Fanon in the Andes: Fausto Reinaga, Indianismo, and the Black Atlantic' (2008: 18).

confronted by, different temporalities that pertain to other-than-capitalist modes of production. Although the idea of a state-time is not developed for Zavaleta, it seems that it refers to the projection of a common history and life-cycle, the representation of civil society's internal dynamics in a political-cultural form of unification – the nation-state. In other words, state-time might be comprehended as the temporal dimension of the achieved hegemony, its crystallization in the autonomy of the political dictating the rhythms of the projected unity of the social, that is, in terms of historical narratives cycles of representation, and institutional presence broadly speaking. In Zavaleta's terms, an accomplished state-time concentrates the political determination of a society; conversely, the state's lack of temporal density characteristic of an apparent state provokes despair, heterogeneous demands and interpellation forces, and non-calculable eventuation of social struggles. Posited at the antipodes of the 'optimum' connection between mode of production and superstructures, the apparent state expresses a lack in the capacity of representation in both its political and epistemological meanings.

*Lo abigarrado and the Recasting of the Epistemological Question*

In 'Four Concepts of Democracy', in dealing with the problem of representation in motley societies, Zavaleta asserts that it is necessary to pay attention

at least to three moments: first, the society's non-unification or, at least, the dissimilar penetration of the unified in its sectors, which is what the motley [*lo abigarrado*] refers to. In its extreme, one can grasp here a degree of disconnection between [productive] factors and then talk of an apparent state, since civil society is but an enumeration, not an organic bind together. Second, the non-unification – either national or classist – of the dominant class itself, something that presumes a type of surplus circulation which aspires to be retained as rent, not as state-time. Third, the nucleus of intensity of the determination is erratically located outside state-time. Here society moves in an occasional manner, as if it were totalized but around occasional convocations or structural moments. It lacks then of continuity as becoming..." (2013e: 521)

Zavaleta unpacks here the three moments of disconnection of the productive factors expressive of a non-combined overlapping of different modes of production; the weakness in the dominant class' unification; and the different temporalities struggling for the determination of social conflicts with the only partially dominant state-time. For the characterization of motley societies, this amounts to a seemingly random or disjointed distribution of instances of 'determination' among structures and superstructures. In this sense, Zavaleta argues that *abigarramiento*<sup>103</sup> entails an internal limit to the democratic claims of representation and, concomitantly, to the efficacy of the state-knowledge. The lack of adequate mediations between state and civil society severely hinders the ability of state's successful interpellation. In motley or disjointed societies, a twofold problem derives from this weakness: first, a democratic deficit of self-representation of a national state which amounts, second, to an internal limitation to the calculability of the society in question. Hence "the inability to self-representation is characteristic of peoples that have not become nations." (2013c: 520)

In another article, Zavaleta indicates an element that further complicates the matter: what he calls the "partial transference of state-phases [*fases estatales*]" from metropolis to peripheries (2013g, 410). Understood as a feature of dependence situations,<sup>104</sup> this sort of transference is an expression of the lack of self-determination of a nation-state, the nullification of internal power over other forces coming from the international setting. This mainly affects those cases of partial or failed processes of nation-state formation under imperialism such as Latin America's states, aggravating in consequence their disjointedness. In sum, internal heterogeneity of modes of production, multiple interpellations and temporalities, and transference of state-phases, are conditions of motley societies.

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<sup>103</sup> While the adjective *abigarrado* can be fairly translated as 'motley', its nominalization has been rendered by Gareth Williams (2015) as 'disjointedness'.

<sup>104</sup> Regarding dependency theory, Zavaleta questioned the rectification of the phenomenon, that is, the aim to arrive to a general theory of the dependence situation. Without negating the important contributions made by this school, he nonetheless rejects the generalising pretensions that characterised it. In his own words, "each social formation or country elaborates a particular type of dependence. Dependence is by nature a particular fact; each social formation or country expresses a particular type of dependence" (2013k: 563).

Thus far, the category of motley has presented itself as a negative definition, always in contradistinction to some other (if ideal) opposed sites of normality, connection, wholesomeness – in sum, achieved nationalization. I argue however that notwithstanding Zavaleta’s definitions of the category in purely negative terms, the epistemological problem it posits allowed him to envisage a ‘method’ adequate to this otherwise anomalous condition. The motley or disjointed, in my reading, emerges in Zavaleta’s writings as both an analytical issue for the materialist historian and an epistemological-political inquiry into the possibilities of self-determination and self-knowledge of the working class. While this is not completely apparent in his more theoretical articles, it fully transpires when one approaches his more ambitious, ultimately unfinished book: *The National-Popular in Bolivia*. We will return to this work in the following section.

To recapitulate, the key issue emerging in *Dual Power* (namely, the overlapping of temporalities in the ‘passage’ from capitalism to socialism) demanded a thorough reconsideration of the dialectics between structures and superstructures. By means of the translation of formal and real subsumption into the process of nationalization of a society, Zavaleta coins the idea of ‘apparent state’ to identify the non-totalization of state-time – hence also of legibility and representation – marking the periphery. In these regions “we call state to a fraction [of society]; actually, the state-embryo is still subsumed into civil society” (2013c: 527). In a perspective that somewhat echoes the arguments made by subalternist scholars on the conspicuous complicities between domination and the subalterns’ ‘representation’ in modern political regimes (cf. Spivak 1988; Chakrabarty 2000 Introduction), Zavaleta identifies *lo abigarrado* as the non-combined superimposition of modes of productions and of temporalization, in which pre-capitalist social relations remain irreducible to capital’s model of regularity and its correspondent superstructure. In this sense, Bosteels, Draper and Freeland correctly argue that *abigarramiento* or disjointedness works against homogenizing categories and policies (cf. Bosteels, 2005; Freeland, 2014a; S. Draper, n/d).

Nonetheless, the heterogeneity of motley societies is not as a simple limitation, but also works as a potential source of social knowledge. The perception of this potentiality becomes attainable for the Zavaleta when considered from the viewpoint of the abovementioned idea of ‘accumulation at the heart of the working

class'. Luis Tapia (2002: 125) explains that this category functions in Zavaleta's Marxism as the conceptual replacement of his former notion of 'national consciousness'. Moreover, accumulation can also be read as a processual descriptor for the Marxist notion of class consciousness. This is important because it refers to the problem of endowing the working class with a privileged epistemological standpoint, as Lukàcs expressed it in *History and Class Consciousness* and Zavaleta did in 'Class and Knowledge'. Already in this 1975 article, Zavaleta put the issue in the following terms: the proletariat "cannot know itself without knowing society in its entirety, consequently invading the remaining, not properly classist groups - that is, practicing its own irradiation. Such irradiation is already an ideological overflowing, which distorts the distribution of ideological hegemony we call normal (that of the dominant class) and, as it is obvious, residing in the moment of revolutionary crisis." A clash of irradiation forces between dominant classes and the proletariat is here projected as the outcome of proletariat knowledge, something fully apparent only in those critical moments in which revolution emerges as possibility. Zavaleta goes on: "[o]utside the accumulation at the heart of the working class, the acquisition of the scientific instrument (Marxism) is impossible; as a consequence, the inward development of this class is also the key for to know a motley formation" (2013b: 389).

It seems to me that all the elements of Zavaleta's understanding of the epistemological questions posited by the hetero-temporality of a revolutionary politics in motley societies appear in this passage. The passage indicates the overdetermination of clashing temporalities, self-knowledge through class-accumulation, and 'irradiation', an overdetermination that compounds a potential method emerging in times of crisis - which can be termed 'crisis as method'. By explaining the components interwoven in this very condensed paragraph, the following section will attempt to make sense of the particular kind of nationalization that Zavaleta's Marxism operates to the notions of class and class-consciousness.

#### 4. Crisis as Method: Bolivian Masses and the Indianization of the Proletariat

##### *Class Accumulation and Irradiation*

As it was said above, the problematization of the ‘subsumption’ of Marxist theory into an allegedly backward working class allowed Zavaleta to put into tension the linear conception of class accumulation and class knowledge. At a conceptual level, this is evident in the formulation that he gave to this idea in the text ‘Class Form and Multitude Form in Bolivia’s Mining Proletariat’. This is an article written in 1982 and published for the collective volume *Bolivia Hoy* (that he himself compiled) in 1983. Conversely, the contributions to this volume (Silvia Rivera Cusicanqui and Luis Antezana are among the authors) are to be traced to the debate opened up within the journal *Basis*. In one of his few definitions of *acumulación en el seno de la clase*, the multi-layered process encompassed is approached in the following terms: “the concept of accumulation at the heart of the class [...] is a metaphor referred to the positive and negative selection mechanisms in the movements of collective knowledge.” (2013d: 584) Understood as a collective process marked by moments of selection, class accumulation refers to the incorporation of both popular tactics of struggle and their rationale. Incorporation, or acquisition, means for Zavaleta the “becom[ing] part of the general good sense or popular prejudice after the selection.” (2013e: 581) It is also referred to as ‘mass-memory’ (*memoria de masa*), reinforcing the collective dimension of the achieved knowledge.

Zavaleta further clarifies the distance he takes from a well-defined notion of class-formation by saying that “[w]hile by social class one understands a logic-formal object, the composite milieu [*medio compuesto*] is already the realm in which classes and non-classist strata occur –that is, it makes reference to a hybridity” (2013d: 580-81). It is within such a hybrid condition that class accumulation takes place in a motley society. This, in turn, signals in my view that the qualification of the attained knowledge is not pre-defined in any way, but rather is the product of encounters between different types of knowledges

Furthermore, Zavaleta understands that it is in and through class accumulation that the working class comes to know itself ‘knowing society in its entirety’ and ‘*practicing its own irradiation.*’ Irradiation, as we saw above, is the

ideological overflowing (*rebasamiento*) of the 'normal', dominant ideology. Nonetheless, in 'Four Concepts' a reference to Foucault's 'Truth and Juridical Forms' indicates that we are not before a mere synonym of Althusser's interpellation. In what is arguably one of the more 'Marxist' of Foucault's writings (cf. Toscano, 2014), Foucault conceives a plurality of knowledges as the ground upon which a given set of social relations is transformed into a will to power, albeit none of these knowledges is in any way pre-determined to become a knowledge-power (cf. Foucault, 2001). Zavaleta shares Foucault's multi-dimensional conception of knowledge when referring to the irradiation act, as this caveat shows:

[T]he composite group is what its structural – or productive, if you will – location is plus the type of constituted interpellation. This is to say that, whether existing or not the centrality [of the working class] as a *fatum* – something that we prefer to leave it outstanding [and here the footnote refers to Foucault's 'Truth and Juridical Forms'] – nonetheless it must be *constituted*. (2013d: 579, original emphasis)

If my reading is correct, Zavaleta recurs to the concept-image of irradiation (a synonym he also provides is *iluminación*, illumination or enlightening) and suggestively adds to it Foucault's reflections on the heterogeneous and non-deterministic nature of knowledge-power. This is a way to transcend the framework of the notion of 'ideology', particularly in its use as qualifier of a pre-defined central subject of knowledge.<sup>105</sup> However, along with the incorporation of this plurality of knowledges that irradiate one other and thereby bring about the composite milieu, Zavaleta refuses to give up attention to the structural class-positioning of these elements – hence his insistence on their constituted character.

It seems to me that Zavaleta is suggesting that, while the centrality of the actual working class needs to be relativized in motley societies, the pluriverse of knowledges, memories and ways of resistance becomes precisely the field within which the materialist historian must reconstruct the process of class accumulation. Zavaleta's *irradiación* therefore transcends the worker-centred and 'diffusionist'

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<sup>105</sup> This is what is suggested in his critique of Althusser's notion of 'ideological state apparatus' (in 'The Apparent Formations in Marx'), considered as a reading of Gramsci in which a "truly missing in specificity of the state fact" is conveyed. Following Althusser's reasoning – Zavaleta concludes – one could even think that "Lenin's party was an ideological apparatus of the Tsarist state." (2013f: 450, 453)

understanding of an allegedly privileged proletarian knowledge. On the contrary, what these formulations convey is a complex, multi-layered, and expanding conception of class.

*Masses and Structures of Rebellion*

Thus delimited, the notion of class consciousness may appear as a merely rhetorical recourse to identity. However, the ruminations opening 'Apparent Formations' show that as early as 1975 Zavaleta conceived class consciousness in terms of the unfolding of intertwined elements: "What is that abstract bundle [*bulto abstracto*] we call consciousness but the destruction of a previous consciousness?", he asks so as to respond that "if consciousness comes from an internal displacement (a consciousness is the ruin of its own anteriority), its veracity comes in turn from the capacity of ascertainment of the age [*capacidad de comprobación de una época*]." (2013f: 427) Zavaleta is pointing out here the processual character of any consciousness, a process which leaves behind its own previous 'bundles' in a self-critical movement. This self-critical movement, conversely, becomes actual only insofar as it demonstrates itself to mobilize present-day tasks and demands. This is rather an idiosyncratic way to say that the class-knowledge is what its particular history is, and that its pertinence depends on both learnings and the ability to situate those learnings in present time - timeliness. This is why class accumulation - a processual descriptor for class consciousness - is considered the key for the knowledge of a motley society.' In other words, Zavaleta's reflections seem to point to the fact that class knowledge is attained by looking into class accumulation, i.e. by digging into the history of irradiations, encounters and misencounters between subaltern groups - a process whereby consciousness itself is de-centred from its.

The term 'masses' - Zavaleta indicates - draws on Marx's idea of the force of masses or collectives as a *productive* force, not a mere aggregate of individuals. What is more, the mass is constituted as against the state: "[b]y mass, we understand a sort of polarisation. *The mass is acting civil society, that is, a pathetic [patético], sentimental and epic state of unification.*" (2013c: 526, emphasis added) This

unification, described as emotional and sentimental,<sup>106</sup> is attained at the level of civil society, which has in my view a double implication. On the one hand, the masses form a force-field wider than class, yet one in which class accumulation takes place; on the other, it identifies a moment of counteraction that defies state power, a moment in which the elements of civil society achieve a unification and, potentially, self-determination. This unification puts the isolation of individuals, of territories, and cultures into a standstill, suspending at the same time the categorical distinction of politics and society.

Therefore, we must say that in Zavaleta's formulation mass is a political concept, expressive of an embryo collective will. Mass, also called multitudes in the same article (cf. Zavaleta Mercado 2013d), seems to play down the relevance of the proletariat's knowledge as leading force of social struggles: "[t]his is valid [only] for certain specific societies already proletarianized, and for certain proletariats", Zavaleta (2013c: 526) points out. To be sure, this is not the case for motley societies. Zavaleta understands this counteraction as the unification of determined 'structures of rebellion' in opposition to the state: "The history of the masses is always a history made against the state, so that we are talking here of structures of rebellion and not of forms of [state] belonging. Every state, in the last instance, negates the mass" (2013c: 526).

It might seem that Zavaleta parallels here some of Laclau's formulations, for whom the opposition of the people and the 'dominant bloc' at the level of the social formation is the prominent gap through which the articulation of populist demands occurs, an articulation whose contents are always indeterminate, contingent (cf. Laclau, 2005, particularly Part III; see also his early 1979). However, in Zavaleta's view the 'popular' element embodied by masses or multitudes must be considered not in terms of a Manichean distinction of state and civil society, but instead as displacement of the class itself: "Multitude" – as he says in 'Masses in November' – "is understood here as the *modified* form of the class." (2013h: 109, original emphasis) Masses or multitudes, therefore, are the manifestation of an active

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<sup>106</sup> In 'A Note on Translation' to *The National-Popular in Bolivia*, Anne Freeland says that 'pathetic' [*patético*] "should always be read here as the adjectival form of *pathos* and not in the colloquial sense. It does not, however, refer to rhetoric, but to the affective element of social identification and collective subject formation." (2017)

moment in which civil society (understood thus in a relational and not merely topological sense) finds a certain coherence by means of a displacement. This movement, in turn, is actualized in the very interregnum that the apparent state necessarily generates given its non-combined nature, and expresses itself in different temporalities, interpellations, and structures of rebellion coming together so as to give form to a multitude. As structures of rebellion and not of state-belonging, they bear with them dispositions to collective sovereignty that have remained disperse, partially outside the state-time, its knowledges, and forms of representation.

Therefore, when Zavaleta comprehends multitude as acting civil society which in turn modifies the class, we can read it as a moment or state of synchronization (however partial) of the temporalities embodied in these structures of rebellion. The coming together of different temporalities, memories, and struggle forms, precipitates a 'sentimental' and 'pathetic' – affective, that is – unification. It seems to me that the emphasis on the affective quality of this encounter is used by Zavaleta to prevent the pre-eminence of one of these knowledges or rationales over the others. The modification of the concept of class within the composite milieu in which 'mass' occurs is thus indicative of the interplay of different classes and social groups ('positions', as they were called with reference to Foucault) in the process of becoming multitude. The momentum for this fusion to take place is 'crisis'.

#### *Crisis as Method and the National-Popular Question*

*Sociedades abigarradas*, understood as non-totalized entities, appeared in Zavaleta's early writings as a touchstone for both class accumulation and emancipation knowledge. If motley societies cannot be "represented" either by state rationality or by official science – as Zavaleta (2013k: 562) reiterates in 'Problems of Dependent Determination' –, then the moments of totalization of motley societies surface not in normal times but rather in situations of exception – crises. During these situations, the disjointed structures and temporalities populating the social formation converge: "[t]he very time of the factors (and the main difference between modes of production is the quality of human time) acts in a continuous and confluent mode but in its critical manifestation" (Zavaleta, 2013h: 106). This is a very interesting

passage, as it stresses the difference between structures of temporalization as an important dimension of motley societies. Accordingly, if a motley society is unable to experience its own elements, permanent and organic manner, crisis is a conjuncture in which those discontinuous temporalities and knowledges reveal themselves not only as contemporaneous and coterminous but also co-constitutive, composite, and affecting – irradiating – one another.

The possibility of knowledge in motley societies emerges thus from crisis as a singular *political* event, a moment in which the disjointed elements of the social formation bursts forth to a common terrain. The crisis is political not only because it puts into question the ‘autonomy of the political’ in its institutionalized crystallization; it is also political as it reveals the ‘irradiation’ between subaltern classes and groups. This means that crisis are products of the encounters occurring in the process of becoming-multitude, at time that such a becoming is revealed in its own historicity through such a critical moment. Luis Antezana summarizes the point by saying that in Zavaleta’s thought *lo abigarrado* becomes both the condition of crisis and the method of knowledge that emerges through such a crisis (1991: 128).

‘Crisis as method’ is in my view the procedure framing Zavaleta’s most ambitious, finally unfinished project: *The National-Popular in Bolivia*.<sup>107</sup> In it, the method is aimed at reconstructing class accumulation in Bolivia: I argue that this is *the* subject of this book. Zavaleta mobilizes here the conceptual tools he developed during his more than a decade of thought informed by Marxism. By means of crisis as method, the concepts of constitutive moment, motley society, class accumulation,

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<sup>107</sup> As Anne Freeland (2017) indicates, Zavaleta’s manuscript held the title *Elementos para una Historia de lo Nacional Popular en Bolivia: 1879-1980* (rendered by herself as *Toward a History of the National-Popular in Bolivia: 1879-1980*); yet it was published by editorial Siglo XXI (México) in 1986 under the abbreviated title *The National-Popular in Bolivia*. The 2013 (third) edition by Plural (Bolivia) –part of Zavaleta’s Complete Works, Vol. II – constitutes an improved version, since the editors worked on the original manuscripts, correcting errata and adding further bibliographical references. However, they do not restore Zavaleta’s original title. In this sense, this work pertains to the species (almost a genre in itself) of ‘Marxist non-works’, unfinished manuscripts and works-in-progress never published by their authors which are recovered later on and then become milestones for the comprehension of the author’s perspectives. This is the case of Marx’s *Paris Manuscripts*, *Grundrisse*, even *Capital* in its entirety; also of Lenin’s *Philosophical Notebooks*, Gramsci’s *Prison Notebooks*, Benjamin’s *Theses on History*, Althusser’s *Materialism of the Encounter*: and, in Latin America, and of Mariátegui’s much-debated book on *Politics and Ideology in Peru*, among many others.

and compound milieu are displayed so as to explain the characteristics of the object 'Bolivia'. The formal structure of the work envisaged an Introduction which summarizes the projected whole and advances some methodological clarifications; and four chapters. In the manuscript left by Zavaleta, Chapter I and II reached a more finished form than Chapter III, while Chapter I more than II. Chapter IV, in turn, which was dedicated to the contemporary period was not even started (more on this below).

The Introduction makes this methodological remark:

[W]e will proceed by isolating certain events, circumscribed in time, or regional situations, circumscribed in space. This is a response to a scarcity of information and it undoubtedly entails a symbolic selection. In defense of this method it must be said that no social science is possible otherwise in a country like Bolivia. (2017)

These moments are instances of crisis. This is why Chapter I (entitled 'The Struggle for the Surplus') corresponds to the account of the 'constitutive moment' of 1879, the Pacific War (*Guerra del Pacífico*) waged by Bolivia and Peru against Chile, in which Bolivia lost access to the ocean as well as the important resources of nitrate and copper. Chapter II ('The World of the Fearsome Willka') analyses in turn the civil war of 1899, which is known in Bolivian historiography as the Federal Revolution, when two fractions of the dominant classes confronted one another. One of them mobilized indigenous (particularly Aymara) uprisings as a manner to back its own momentum. However, the outcome of these uprisings was indeed the return to a newer unity of these dominant classes, due to the fear to these mass-mobilizations they themselves initially fostered.

Another war is the focus of Chapter III ('The Torpor of Centuries'): the Chaco War (*Guerra del Chaco*) waged against Paraguay between 1930 and 1935, a moment in which Zavaleta sees once again the lack of belonging that Bolivian population feels towards 'its' state. Conversely, Chapter IV (paradoxically, the non-written part of the book) was the central concern of the whole, as stated from the outset: "the subsequent history of Bolivia is but the unravelling of the elements of the crisis of 1952. Thereafter, the class subjects only reproduce the conditions of their performance at that crucial moment." As a whole, *The National-Popular* projects the

successive overlapping of critical conjunctures in a manner in which “[t]he history of these hundred years in Bolivia will therefore necessarily be the history of a series of crises or pathetic social agglutinations.” (2017) Zavaleta’s method qualifies crises as objects of knowledge in order to come to terms with Bolivia’s ‘motley’ apparent state and class accumulation. As this disarticulation of modes of productions and temporalities implies a non-totalization, a non-combined juxtaposition, crises become moments of partial or potential totalization.

‘Crisis as method’ is further qualified by Zavaleta, in consideration of the relative minority of the working class:

Quantification itself, as we shall see throughout this history, plays a more limited part in more motley societies [*sociedades abigarradas*]; on the other hand, it is at the moment of crisis or its equivalent (a moment of intensity) that can be seen in its results or synthesis, for this constitutes the only phase of concentration or centralization in a formation that otherwise would appear only as an archipelago [...] (2017, trans. modified).

The period that follows the critical events of the 1952 revolution – the constitutive moment of contemporary Bolivia in Zavaleta’s view – was not developed in the final manuscript. Nonetheless, the article ‘Masses in November’ from 1983 (Zavaleta’s last essay) contains what seems to be a veritable stand-in of the projected chapter, as Luis Tapia (2002: 336) and Anne Freeland (2017) indicate. ‘November’ designates the events that took part in that month of 1979, which marked the fall of Hugo Banzer’s dictatorship and opened the horizon of a new democratic period.

In Zavaleta’s account, the historical novelty of the event is twofold. On the one hand, the working class ascribed for the first time to a democratic platform, leaving behind a history of disdain towards the question of democracy. A disdain that – one might add – only mirrored the dominant classes’ own disregard towards formal democracy, and which was deeply embodied in Bolivia’s fragile institutions – as expressed in constant military regimes. As we already saw in Chapter V, democracy marked an important chapter of left-wing concerns during the 1980s, for instance in Aricó’s turn towards a rather liberal definition of the democratic question. For Zavaleta, in contradistinction, the class contents of the democratic question

continued to play a role in the political evaluation of the political struggle. And while the dominant classes projected a kind of incomplete democracy, the Bolivian Marxist qualified the working-class orientation to democracy with what he considered the process of class accumulation.

On the other hand, and complementing the last point, Zavaleta indicates that for the first time in Bolivia's history a working-class mobilization was joined by peasant and indigenous uprisings all over the country. In Zavaleta's words,

[i]t is the first time that the peasantry as a whole supports the workers' general strike, so this is the axis in which multitude – or, if preferred, a historical bloc – is established. [...] [A]s mass accumulation, it is produced the incorporation of the political methods of the classic agrarian struggle to the working class' insurrectional patterns." (2013h: 109)

The consequences of these critical events from the perspective of class accumulation are made explicit by Zavaleta: "The masses, always underground [*clandestinas*] regarding representative democracy, currently give form to their uprising at the crux [*bajo el lábaro*] of representative democracy, which is now incorporated to the masses' memory or accumulation at the heart of the class." (Ibid.) And it is added that: "there is no doubt that here the masses have constituted themselves around the proletarian interpellation." (Ibid.) In turn, the peasant-indigenous – the bearers of the 'agrarian class struggle' – for the first time and on a national scale appears to have shaken from its subordination to the structures of clientelism and patronage derived from the 1952 revolution (cf. Rivera Cusicanqui, 2010).

I propose here to maintain the conceptual tension between interpellation and irradiation in order to disclose Zavaleta's formulations. This means reading the proletarian interpellation as the form of the event, as it was shaped in the general strike. The general national strike proclaiming a democratic programme was therefore the catalyzer of the becoming-multitude. Conversely, as the metaphor for the history of the encounters, translations, and misunderstandings among varied subaltern structures of rebellion placed along different temporalities and forming the composite milieu, irradiation indicates the mutual influence that the participants of this process exerted to become a multitude. One might say that if the popular

element is to be located at the crossroads of the crisis called 'November', it is under a proletarian *form* mobilized and expressed through a peasant-indigenous *content* for the democratic struggle.

Bolivian historian and political activist Silvia Rivera Cusicanqui offers a complementary account of Zavaleta's.<sup>108</sup> In *Oppressed but not Defeated* (of 1984) she describes the trajectory of struggles of Bolivian peasant-indigenous movements that, in a process of slow detachment from the apparatuses of the 1952 revolution, since mid-1970s started to give rise to *Katarismo*. Indeed, what Zavaleta perceived as the indigenous-peasant mobilization in support of the working class was the *Katarista* movement coming onto the political stage through a quite autonomous pathway (cf. Rivera Cusicanqui, [1984]2010: 186; see also Webber, 2011: 105). Zavaleta indeed perceived (from his exile) such autonomy: in *The National Popular*, he states that "[t]he idea of peasantry as a class that receives and of proletariat as the class that gives, for example, merely follows a dogmatic line. In reality, there is every reason to believe that the peasantry had its own class accumulation and also, as it were, its own class history within the history of classes." (2017) The idea of an autonomous pathway of class-accumulation for the peasant-indigenous derives from the non-combination of these classes and groups vis-à-vis the state-time.

Rivera Cusicanqui anatomizes this emergent indigeneity in terms of the disenchantment of indigenous (Aymara) communities with two 'national' utopias built upon the 1952 state: the utopia of a patronized and nonetheless 'harmonic' relation between 'peasants' and the state; and the utopia of fair and equal trade in the agricultural-industrial exchange at the level of the national market. Furthermore, the Bolivian historian points out three dimensions in the making of *Katarismo*: first, the autonomy that it achieved in relation to the peasant trade-unions, characteristic of the 1952 institutions; second, the ethno-cultural identification with indigenous memories expressed in the claim of the right to "exercise otherness" that configures a "decolonizing horizon" (2010: 218); and third, a political autonomy towards the working class accompanied by a positive acknowledgment of the points of encounter and proximities with it. *Katarismo* emerged as a social force that, while neither homogeneous nor monolithically oriented, certainly pertains to a

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<sup>108</sup> Zavaleta actually quotes and draws his own analysis based on some of Rivera Cusicanqui's early works.

determined structure of rebellion (that of the agrarian community) which furthermore carries a particular form of participation in the democratic struggle, as Zavaleta himself intuited.

#### *Democracy as Self-Determination*

If the particular synthesis identified by Zavaleta in the event called 'November' is read from the notion of masses as 'modification' of the class - as I propose, following his own remarks - then it might be said that such a modification projects the potential synchronization of at least two different traditions of struggle. Zavaleta's argument on the incorporation of the democratic horizon as part of the 'accumulated' memory for the Bolivian working class is coterminous with the 'encounter' of this class with these social elements bursting into the political stage as indigeneity. *Katarismo* was the first name and formulation of this multi-faced politics.<sup>109</sup> Despite his emphasis on the working class (perhaps itself an indication of Bolivia's historical contempt towards the peasants and the 'indigenous question', particularly from the left), Zavaleta identified in the emergent indigeneity of the 1979 conjuncture an internal displacement in Bolivia's political dispositions of the subalterns.

Antezana indicates that 'Masses in November' and *The National-Popular* lead to the conclusion that the democratic dimension stems from the peasant-indigenous side (1991: 23). However, this is explicitly acknowledged by Zavaleta in 'Masses in November', when he says that "if the workers escape someday from their corporative closure, it will be through the development of a project emerging from the peasant movement." (2013h: 111) In other words, and paraphrasing Zavaleta's own remarks on Gramsci (2013i: 194), the fact that he did not put emphasis on the ethno-cultural dimension of the peasant-indigenous masses does not in any case imply that he denies it. On the contrary, he found it crucial for the political maturity of the working class. The fact that, in the Introduction of *The National-Popular*, he considers the agrarian community to be a permanent, long-lasting structure of rebellion remains indicative in this respect:

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<sup>109</sup> This is also Rivera Cusicanqui's interpretation (cf. 2010: 216).

[t]he persistence of the agrarian form of the ‘community’ [puts into evidence] that *the defense and reproduction of this form in practice constitutes the mode of insertion of the peasantry in the democratic movement*. But despite the apparent forms of the haciendas and even smallholdings, at least as far as the classical Andean habitat is concerned, it is clear that it is merely a matter of juridical modalities in which the model of production is maintained, in other words, *ultimately there is a single agricultural form that has persisted over time [...] that is to say, there would be a juridical subsumption, but never a real subsumption*. [...]

In any case, the resistance of the Andean agrarian civilization would demonstrate the impenetrability of this universe to the interpellation of a nondemocratic state and the incompatibility of the seigniorial elite with democratic legitimation. (2017, emphasis added)

The crucial point in Zavaleta’s argument is that the ‘democratic question’ is not, nor it has even been in Bolivia’s apparent state, part of the regular bourgeois hegemony ‘from above’. On the contrary, it has been unleashed from below, that is, from these structures of rebellion and of sovereignty that, in the events of November, flooded as multitude into a popular alliance that crystallized in democratic demands against the 1952 state. I think this is a pivotal difference to other ‘formalistic’ accounts of the national-popular as well as to liberal approaches to the democratization processes of the time in Latin America (even when supported by socialist or communist stances).

What is more, Raquel Gutierrez has proposed to read Zavaleta’s formulations more in the register of the “communitarian-popular” [*popular-comunitario*] (2014: xxvi) than in national-popular terms. I find this all the more pertinent, to the extent that the concept of nation still bears the burden of the state-time and casts its light upon a projected homogenized population. In this sense, the heterogeneity entailed in *lo abigarrado* makes it impossible the subsumption of these disparate temporalities into capital’s logic of social democratization and its nationalization from above, however multi-cultural or pluri-cultural they may be. The ‘popular’ elements lie not in the state but rather in the structures of rebellion rooted in other modes of production and of temporalization. Conversely, they only make themselves visible at the point of becoming part of the multitude’s active self-

determination at the moment of crisis. 'Democracy' emerges then as the encountering point of these elements, and the demands it encompasses match in their challenge to the 'apparent' 1952 state.

In motley societies, class-knowledge is only possible by means of a movement in which the class becomes other than itself, that is, by an active work of translation between the subaltern structures of rebellion that converge in the eventful process of becoming-multitude. This translational network is what in my view is indicated by irradiation; in the November crisis, such a process reached in democracy the veritable common horizon of these temporalities and structures. The fact that Zavaleta did not give priority to the ethno-cultural elements in this translational 'composite milieu', does not in my view diminish his contribution to an interpretation of Marxism capable of coming to terms with the emergent indigeneity. From a materialist standpoint which is also sensitive to other subaltern ways of worlding, structures of temporalization and of rebellion (that is, in motley societies to structures different from the capitalist model of regularity), Zavaleta envisaged the passage from the quantitative inferiority of the working class to its epistemological primacy in the moment in which the irradiation of the emergent indigeneity displaces and reorients it towards its own becoming multitude.

## **5. Conclusions**

In a sense, Zavaleta's turn into Marxism was premised by a concern akin to Aricó's, yet in an inverted manner. For, if the latter problematized the ability of Marxism to come to terms with Latin America's social and political dynamics, Zavaleta shifted direction and put into tension the readiness of the proletariat - a class belonging to a 'backward' society - to properly incorporate or subsume, in his terms, the scientific apparatus of historical materialism. These contrasting approaches were consequences of the diverse considerations they displayed towards the claim about the lack of a theory of the state, and of the political, as the heart of Marxism's crisis - such as Althusser's. While both considered epistemological and political issues as part of a unified, entangled problematic for revolutionary theory, Aricó privileged the political side of the coin; conversely, Zavaleta understood that self-determination was indissolubly tied to self-knowledge. Accordingly, his reflections

were oriented to evaluate the conditions whereby a class comes to know itself (or not) in circumstances of only partial totalization of the capitalist mode of production. His core-premise, as we already saw, was that 'the inward development of [the working] class is the key to the knowledge of a motley society.'

From his inaugural commitments with Marxism, marked by the writing of *Dual Power* and his stay in Santiago de Chile, Zavaleta was in necessity of reconstructing the Marxist conceptual apparatus. The epistemological and political dimensions were, in this effort, always considered together, as the two aspects of a single problem: the possibility (in a peripheral, underdeveloped, motley society) to overcome the quantitative inferiority of the working class in order for it to achieve epistemological and political primacy. Therefore, the recourse to notions such as model of regularity, apparent state, interpellation/irradiation, composite milieu, accumulation at the heart of the class (or mass-memory), and mass/multitude were instrumental to answer that question.

In the actualization of this reframed-Marxist conceptual apparatus, a number of consequences come into view. First, the idea of differed correspondence between model of regularity and the always particular, specific forms of aggregation of the capitalist superstructures built upon it. This differed correspondence serves to point out that no general theory of the state is possible from a coherent Marxist viewpoint. Second, the idea of apparent state as an outcome of non-capitalistically totalized societies, in which not only different modes of production remain, but also the typical forms of representation (formal democracy, social calculability) are hindered, making difficult the determination of the knowledge attainable in motley societies. The idea of apparent state finds concretion in the deficiencies to build a generalized state-time, a unified and combining narrative able to encompass the diversity of a country. In contradistinction to Aricó, Zavaleta held a negative consideration of the state as society-builder. Furthermore, he also criticized *dependentista* attempts to derivate a general law of motion for 'dependent' countries. In this sense, the condition of *abigarramiento* prevents from both homogeneizing templates of class-formation and liberal qualifications of the society's political will.

Third, there is the idea of composite milieu, the heterogeneous, hetero-temporal social realm in which diverse forms of temporalization, social relations,

and structures of rebellion participate in a non-combined, decentralized, and uneven manner. Within such a composite milieu, relations among the different knowledges embodied in these temporal entanglements take place, determining the ways and intensities of the exchanges (irradiations, interpellations) between these entities. This is the realm in which the accumulation at the heart of the working class (understood as a composite of diverse knowledges, practices, and temporalities co-existing in a determinate space) is produced and incorporated as mass-memory. And finally, the reference to this accumulation qualifies a complex, multi-layered and expanding concept of class (as mass or multitude), far away from its reduction to a pre-defined model of proletariat, and which projects a non-deterministic, inherently pluralistic way to reach class consciousness.

One of the most suggestive of Zavaleta's arguments refers to the implications that the 'motley' condition conveys. As a non-combined aggregation, *lo abigarrado* indicates the limit in which the confluence of histories, temporalities, memories, and knowledges does not form an organic articulation. In this sense, Zavaleta suggest the hypothesis of an uneven and non-combined development, in which the articulation of these elements occurs but in its more formal level (cf. Ouviaña, 2010: 204). This argument seems to echo Chakrabarty's (2000; see also the chapter I of this work) identification of Histories 2, those structures of temporalization that remain outside, non-subsumed to capital's History 1. In this sense, the claim for a total social knowledge is severely put into question, and the reduction of these temporal densities to a single matrix - in Zavaleta's terms, the reductive translation of the concrete history of aggregations into the level of the model of regularity - becomes invalidated. This is what is dismissed in his writings: the projection of a universal grammar of class struggle.

However, the Bolivian Marxist understood crisis as a moment in which the totalization of society is expressed in a dramatic manner. Crisis is both the tearing of a society and the moment of its universalization, to the extent that in crisis these non-combined forms are brought together as participating in a common temporality. In other words, the moment of crisis reveals the emergence of subaltern forces alien to state-time and its forms of representation, at time that it constitutes a momentum for potential nationalization. Therefore, the hypothesis of non-combined uneven development does not assume a merely external or oppositional

relation among temporalities, but rather envisages the particular events indicating the potential synchronization among them. This is why, in the formulation of 'crisis as method', Zavaleta assumes that accumulation at the heart of the class (that is, the history of encounters and misencounters, of translations and mistranslations, of negative and positive selections, between these structures of temporality and rebellion) is the index for the maturation of a class-consciousness. A consciousness that, while finding ground in the model of regularity, is nonetheless open to the concrete history of exchanges with other subaltern forces.

As against the mere differentiation of capital vis-à-vis other-than-capital temporalizations, crisis (both distortion and unification) becomes a political event of the first order. In the context of Bolivia's apparent state built upon the 1952 constitutive moment - in continuous (if shaken) functioning during Zavaleta's lifetime -, the non-combined nature of the hetero-temporal entanglement found in the November events a moment of potential democratization from below. The importance of the autonomy displayed by peasant-indigenous revolts and the demands they conveyed, in this sense, is indicative of the incorporation of the democratic question in the memory of Bolivian masses. This incorporation, in turn, is embodied in the indigenous defense of the agrarian mode of production, considered by Rivera Cusicanqui in terms of the right to exercise otherness. In this sense, the democratic horizon envisaged by Zavaleta in the November crisis can be read in terms of a decolonizing horizon as well. Insofar as it incorporates the *Katarista* contributions to the clarification of the particular grammars of class struggle in the country, these structures of rebellion constitute a subaltern qualifier of democracy.

In conclusion, Zavaleta's idiosyncratic, perhaps baroque (or 'motley') conceptualizations are an important moment of Latin American Marxism. The crisis of Marxism opened up the possibility to rethink Marxist theory in general, and particularly its relations with the diversity of social realities it intends to comprehend. The translation of the categories of formal and real subsumption into the process of nationalization comes to reveal the 'motley' nature of Bolivia and other Latin American countries. Conversely, crises are reevaluated in terms of their epistemological potential for a coming to terms with those other-than-capitalist temporalities. What transpires from Zavaleta's account of Bolivian history, in

consequence, is the projected hegemony of the working class – the achievement of its universal, post-corporative moment – in a non-homogeneizing manner, since the very formation of the class as political subject is historically variable, porous, and heterogeneous.

In other words: insofar as it can but be motley, disjointed, irreducibly heterogeneous, a hegemonic working class is constituted over democratic, non-reductive and dialogical axes. The bursting of indigenous rebellions and the incorporation of their forms and contents into mass-memory – and into Zavaleta's Marxism – envisages the incorporation of the democratic question in a decolonizing perspective. A perspective in which the co-existence of knowledges does not imply a pre-determined hierarchization among them; rather, it demands for the materialist historian a concrete account of the transferences, translations, and (mis)encounters by means of which a multitude becomes a concrete, historical political subject. Therefore, by incorporating indigenous memories and structures of rebellion as elements *internal* to the process of class accumulation and class consciousness, democracy becomes qualified by a decolonizing, subaltern perspective.

It is not a matter of chance that the decade of the 1980s witnessed (in Bolivia and elsewhere) a neoliberal restoration which, on the one hand, dismantled the working-places and symbolic grounds of the mining proletariat and, on the other, promoted a multi-cultural integration 'from above'<sup>110</sup> which left the material sources of unevenness untouched, to say the least. As against this kind of policies, the category of motley society, and the crisis as method derived from it, can be read as a lucid indication about the need of qualification of both the democratic question and its cultural drifts. Following Zavaleta's insights, what is missed in both neoliberal multiculturalism and orthodox Marxism (i.e. the blind faith on the centrality of the working class) is a concrete consideration of the complex history of exchanges,

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<sup>110</sup> This neoliberal, multi-cultural policy was promoted by media campaigns and supported by the cooptation of indigenous-peasant leaders, as it was the case of the incorporation of former *Katarista* activist Victor Hugo Cárdenas as vice-president of Gonzalo Sánchez de Losada's first term in office (1993-1997). Jeffery Webber summarizes this period saying that "[n]eoliberal political and economic reforms accompanied the shift in state-policies toward multicultural recognition of indigenous communities, and these reforms are well known to exacerbate or sustain existing material inequalities between social classes." (2011: 4-5)

encounters, and mistranslations between different, non-combined modes of production, structures of temporality and of rebellion co-existing in Bolivia.

## Afterwords. (Non)Concluding Remarks on Marxism and Latin America

[...] detrás del secuestro de esos muertos, está el culto por la historiografía, tan de arriba, tan incoherente, tan inútil. Eso de que la historia que vale y cuenta es la que está en un libro, una tesis, un museo, un monumento, y en los equivalentes actuales y futuros, que no son sino una forma pueril de domesticar la historia de abajo.'

Sub-Comandante Insurgente Marcos,  
*Rebobinar 2*, 2013

'The tradition of all dead generations weighs like a nightmare on the brains of the living.'

K. Marx, 'The Eighteenth Brumaire of Louis Bonaparte', 1852

'We suffer not only from the living, but from the dead.'

K. Marx, Preface to *Capital* Vol. I, 1867

The aim of this research has been to think critically with some of the salient works, currents, and authors that compose the constellation I have proposed to call 'Latin American Marxism'. Neither an exhaustive nor all-encompassing account, there is in this argument no claim to archival authority. My theoretical sample might be considered by some readers as inexcusably incomplete. However, the lineage presented this research illuminates the theoretical and analytical problems that the placing of Latin America besides Marxism brings about; arguably, all considered the apparent mismatch between these two terms as an issue that was not just conceptual or theoretical but crucially political, that is, critical to the prospects for a genuine socialist politics in the region. It has been the purpose of this work to reconstruct these formulations as a contribution to the critical history of Marxism in Latin America.

More concretely, what my critical survey and reconstruction has attempted to demonstrate is the emergence of a varyingly articulated nexus between the concepts of uneven and combined development, hetero-temporality, and translation as leitmotifs that informed – sometimes explicitly, sometimes unwittingly – the many-faced subalternist perspective within Marxism in Latin America. In this sense, the constellation of ideas, names and works explored in this thesis portrays a common sensibility with respect to problems that haunted Marxist theorizations in the sub-continent. Nonetheless, as Chapter I demonstrates, these theoretical problems and orientations were in no way exclusive to Latin American – nor even Global-South – Marxists. On the contrary, as Harry Harootunian (2015) has argued, this intellectual sensibility towards the *multiverse* that grounds world history is already present in some non-canonical texts of classical Marxism. To an important extent, the problematization of capital's temporality is present as early as Marx's ruminations on the paradoxical coevalness of anachronic structures, expressed by the politically backward but nonetheless philosophically advanced Germany – a line of reasoning that continued through Lenin, Trotsky and Luxemburg first, and then with Gramsci, Benjamin, and Bloch, up to more contemporary Marxist thinkers. In this chronological sequence, Mariátegui is a true contemporary of that inter-war generation of European Marxists in his adoption and recreation of a Leninian Marxism (to borrow Aricó's formulation so as to differentiate it from 'Leninism').

In Chapter II and Chapter III, I offer a reading of Mariátegui's Marxism that, while informed by the enormous amount of secondary literature devoted to his *oeuvre*, attempts to think with Mariátegui and beyond the straitjacket of the orthodoxy/heterodoxy polarity that preoccupies so many of his exegetes. Chapter II inquires into Mariátegui's dialectics of the international and the national in order to establish a conceptual space for the category of uneven and combined development as an implicit but actual operator of his thought. Furthermore, the experience of coeval ways of being modern in 1920s Peru – the experience of uneven and combined development – triggered a reorientation of Mariátegui's understanding of the working class as the historical subject of a socialist project. Through the incorporation of imperialism into the consideration of both nationalism and socialism for the post-colony, he introduced the 'colour line' as a crucial qualifier of Peru's class struggle – a racialized class struggle. The colour line was thought by

Mariátegui in the specific form of the white/Indian distinction. In doing so, he inaugurated a specific Marxist sensibility towards the national question in Latin America, a sensibility that considers racial and ethnical heterogeneity as a major characteristic of the deficits these countries have historically displayed, and hence projects a non-homogeneizing but overtly plural process of nationalization as both socialization of production and cultural decolonization.

This sensibility was expressed in the centrality given to the 'elements of practical socialism' populating Peru's palimpsest-like economy, immortalized in the claim for an 'Indo-American socialism'. In the matching of socialism and indigenous memories, the 'backward' Indian elements become anticipatory of a socialist solution for the ill-resolved national, democratic tasks. Mariátegui's Marxism envisioned the racialization or ethnicization of class struggle in such a way that the very idea of social revolution underwent a transformation. For if the actuality of revolution (either 'passive' or socialist) demanded a close attention to the affinities between the imperialist racialization of struggles and the local history of Peru's colonial and post-colonial superstructures, the dialectical counterpart of such affinities was to be found in the potential synchronization of 'international' socialism and the 'autochthonous' myth of Pachakutec. The synchronization of these hetero-temporal elements into a concrete 'national' conjuncture was, in my view, the heart of Mariátegui's Indo-American socialist revolution.

Mariátegui's incorporation of indigenous cultural memories into his political imaginary was accompanied by the singular relevance accorded by him to metaphysical disquisitions *within Marxism*, particularly regarding the work of social myths. The otherwise perplexing coupling of Lenin and Sorel (a hallmark of this imaginary) is traced in Chapter III back to Bergson's philosophy of memory and the work of the past in the present. The perspective of uneven and combined development is translated by Mariátegui into Bergson's language of creative evolution and duration; from these coordinates, he comes to terms with the virtual, durational, and contemporary nature of the myth of Pachakutec - the restoration of Tawantinsuyu or return of the Inka. The translation of socialist revolution into mythical language (the conception of socialist revolution as a living, acting social myth) performed a synchronization of subversive, liberatory Indian structures of

temporalization with the prospects of a worldwide classless society. By means of this perspectival shift, the Peruvian Marxist populated socialism with rich and plural ethno-cultural Andean elements.

The focus on Mariátegui in the first part delineates a subalternist perspective in which communist politics are rooted in communitarian, popular, and subaltern groups, practices, and temporal densities –not in ideal state-forms nor in abstract considerations about cultural incommensurability. The conflation of these last two elements was arguably at the basis of Haya de la Torre’s political imaginary, something that becomes visible in his polemics against Mariátegui and Marxism. It is possible to read Haya’s observations on Latin American temporality as irreducible to Western history (premised on an idiosyncratic adoption of Einstein’s theory of space-time relativity) in terms of an argument about alternative modernities *avant la lettre*. Mariátegui, in contradistinction, defended a multi-level version of Marxist dialectics, in which the Amerindian, Andean peoples participate in both the contemporaneousness of capitalist modernity and the prospects of a world socialist revolution. Instead of abstractly criticizing Eurocentric ideologies, he opened up in Latin America a pathway for coming to terms with the universalization of the particular and the localization of the universal.

The second part of this research assembles three versions of Marxism that, with different means, continued to work upon the mismatch between Latin America and Marxism, this time in the latter’s dominant version of Stalinism. Chapter IV revisits the dependency hypothesis, a label through which I aggregate the otherwise diverse political and intellectual network around so-called dependency theory. The central debate informing the dependency school revolved around possibility for coming to terms with the particular law of (under)development of Latin America’s capitalism. I argue that this debate outlined a way to critically consider the notion of development, notwithstanding the limitations of its positive theoretical formulations.

A general – however succinct – survey on the context and main events that gave momentum to the ‘dependency hypothesis’ is provided in Chapter IV. Understood as a heterogeneous debate, the convergences and dissimilarities between the approach of the dependency school and the framework of uneven and

combined development are conveyed by means of the reconstruction of the debate between Brazilians Fernando H. Cardoso and Ruy Mauro Marini. Aimed at building a local, potentially Third-Worldist paradigm for the social sciences, the dependency hypothesis envisioned a viewpoint to put into question the linear conception of capitalist development. In what can be considered as a hallmark of 'Third-world nationalism', the shortcomings of the dependency hypothesis may be attributed to its 'dependence' to a non-dialectical conception of capitalist development.

Conversely, the transformation of the dependency hypothesis into a coherent general theory for peripheral capitalism, and the lack of conceptual mediations between analytical levels that the Cardoso-Marini debate profusely displays, should not lead to a total dismissal of important conceptual achievements and approaches forged by this current. Even more so when Latin American 'states of compromise' – the same that evidenced the weakness and pitfalls of their developmental roads during the 1960s and '70s – have nowadays by and large been dismantled, aggravating the dependence conditions to multi-national corporations and neo-imperialist institutions.

A comparable destabilization of unilinear conceptions of development was at the basis of Aricó's intervention in the midst of the 'crisis of Marxism' during the late-1970s and '80s. Chapter V offers a reading of *Marx and Latin America* as such an intervention. In it, the notion of misencounter (*desencuentro*) between the hegemonic version of Marxist theory and Latin America's concrete social formations comes to the fore. This misencounter, in turn, allows Aricó to explain the history of misunderstandings that marked the implantation of communist and socialist ideologies throughout the region. In his 'symptomatic' reading of Marx's 'Bolivar y Ponte', Aricó excavated an all-too Eurocentric conception of development. However, these rather unfortunate considerations on Bolívar – and on the independence processes of the sub-continent more generally – contrast with 'another' Marx, the Marx of the writings on Ireland, Spain, India, and the Russian commune. This late, fragmentary Marx demonstrates a sensibility to both uneven development and other-than-Western roads to socialism. For Aricó, it is a conceptual sensibility that invites us to reinitiate a productive dialogue which, while

beginning in and from Latin America, can be situated within a broader Marxist horizon.

In a line of reasoning that echoes Cardoso's version of the dependency hypothesis, yet is aimed at re-reading the Marxist canon as a whole, Aricó indicates that what Marx was unable to perceive in Latin America – but not in other peripheral contexts – was the pivotal role of the political, particularly of the state, in the making of these countries. This blindness is read by Aricó as an inverted Hegelianism, a theoretical framework that prevented Marx from conceiving the state as actually producing civil society. However, the further deepening of these critical reflections led Aricó to a conception of the autonomy of the political informed first by Althusser and Tronti, and later by liberal conceptions of democracy. Aricó participated in the debate about the crisis of Marxism (qualified by Althusser as resting on the lack of a theory of the state) from the Eurocommunist side. His attempt at a theoretical encounter between democracy and socialism brought him closer to the liberal positions characteristic of the process of socialist renovation in the sub-continent – that is, to a merely formal conception of democracy, deprived of class critique.

Despite his late liberal orientation, I consider that Aricó forms part of Latin American Marxism in terms of his comprehension of the role that translations and mistranslations play in the development of a genuine socialist project. On the one hand, his long-lasting non-conformity with dogmatic Marxism was the source of different, perhaps zigzagging endeavours, all of them oriented to nourishing Marxist theory by means of its dialogue with other contemporary philosophical and conceptual coordinates. On the other, his tireless labour as translator and editor of numerous key Marxist works remains unparalleled to date. At the crux of the translational exercise, the theoretical misencounter of Marxism and Latin America outlined by Aricó helps to make visible the unilinear regimes of translation that dominated socialist and communist politics in the region. Conversely, this misencounter is also revelatory of the uneven pathways through which Marxist theorizations can unfold and develop.

René Zavaleta Mercado offered a related but alternative approach to both the crisis of Marxism and the question of democracy. As reconstructed in Chapter VI,

Zavaleta's Marxism shared with Aricó a number of themes, among them the abovementioned crisis of Marxism, its possible encounter with a revolutionary subject in the capitalist periphery, the role of the nation under these conditions, and the value of the democratic question for a socialist horizon. His work was premised on a concern akin to Aricó's, yet in an inverted manner: while the latter questioned the ability of Marxist theory to come to terms with Latin America's social and political dynamics, Zavaleta shifted the approach and problematized the ability of a small proletariat from the periphery to incorporate (in his own terms, 'subsume') historical materialism as part of its own class consciousness.

Acknowledging the need to 'nationalize' Marx's apparatus, Zavaleta elaborated the category of 'motley society' (*sociedad abigarrada*) to approach Bolivia and other Latin American countries. Motley refers to an aggregation of different temporal densities, structures of rebellion, and productive relations, indicating the irreducibility of social heterogeneity to one-sided, top-down policies of formal incorporation of cultural aspects to a national narrative. This conception of *lo abigarrado* lays the ground for a method that finds in the moments of 'crisis' the theoretical-practical event giving momentum to both social knowledge and class consciousness. Crisis as method is the pathway to coming to terms with those moments of unification of what is otherwise *abigarrado*.

Zavaleta understood that working-class consciousness is forged through the encounters and misencounters among the subaltern groups that make up a motley society. In this sense, he positively evaluated the encounter of the mining proletariat and the indigenous movement of *Katarismo* in the events of November 1979. This encounter revolved around 'democracy', a programmatic element that in Zavaleta's account became incorporated for the first time by the Bolivian working class during the 1979 general strike. Zavaleta argues that the democratic element was further qualified by the emergent indigeneity struggling in defence of the Andean, agrarian structure of temporalization. Notwithstanding the fact that Zavaleta did not live long enough to delve deeper into this encounter, in my view he envisioned a perspective in which a proletarian conception of democracy can be conceived in terms of a decolonizing horizon – one that takes seriously indigenous temporalities, structures of rebellion, and knowledges into a historical-materialist account.

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The central aim of this research has been to provide a processual reconstruction of an ensemble of crucial theoretical contributions, showing the presence of a permanent mismatch at the heart of Latin American Marxism. The mismatch between Marxist theory and the sub-continent's particularities can be considered as the source of permanent theoretical trouble, as expressed in the authors and arguments under discussion: implicitly in Mariátegui (but made particularly explicit in his debate with Haya de la Torre) and more openly in the formulations of the dependency school, Aricó, and Zavaleta. In so doing, this work traces the Marxist formulations triggered by this theoretical and political uneasiness, reconstructing the argumentative lines it induced, their conceptual and contextual backdrops, and reformulating the most significant achievements for the prospect of a deprovincialized Marxism.

More particularly, this research shows a narrative of Latin American Marxism in which a family of themes, concerns, and concepts were arrayed to confront the popularized Eurocentrism of mainstream Marxist theorizations. The hypothesis of a subalternization of Latin America by a dominant Eurocentric Marxism was addressed and confronted in very different ways: Mariátegui's anti-imperialist and socialist indigenism, the *dependentistas* economic Third-worldism, Aricó's anti-developmental plea for the virtues of backwardness, and Zavaleta's *lo abigarrado*. In all of these formulations, there is a common question about how to think in universal terms without losing sight of the particular; how to think socialism in, from, and for Latin America. Yet more concretely, within this constellation a subset of themes is identifiable: in particular, the combination of class and racial/ethnic struggles emerges as an important feature of Latin American Marxism. From Mariátegui to Zavaleta, there is a marked conceptual sensibility towards the 'Indian question', more precisely towards the hetero-temporal dimension this question demands from Marxism, if a genuinely Latin-American socialism is to emerge. Indigeneity, the other-than-Latin site of contestations in which indigenous identities

are articulated, constitutes a powerful indication of the subaltern paths followed by some Latin American currents of Marxism towards its decolonization.

The central hypothesis of the thesis, the existence of an intellectual constellation bound together by a subalternist perspective, has been explored and confirmed in our interlinked studies of some of its crucial figures. Of course, the vague appellation to a 'perspective' giving form to a 'constellation' is indicative of the fact we are dealing with neither strictly unified nor coherent formulations among the revised authors and currents. One might speak here of the virtual unity and actual differentiation of a perspective that, in its more abstract point of convergence, took the referent 'Latin America' as a subaltern locus to re-think Marxist theory. The willingness to think both the actuality of capitalism and the prospects of socialism opened through its theoretical-practical criticism from a non-Western (and non-provincial) perspective, characterizes the versions of Marxism investigated herein. As a whole, they instantiate by different, perhaps divergent means what Harootunian has named the deprovincialization of Marxism.

History is still the history of class struggle, just as the *Communist Manifesto* asserted more than 150 years ago. This is not to say that history and class, even politics, remain the same. Historical materialism is not a universal grammar of class struggle, a homogeneous political imaginary and toolkit, but rather a method to critique and combat the capitalist present. If the task of the materialist historian dwells in the patient-yet-urgent reconstruction of the subalterns' collective memory (as Aricó as well as Benjamin asserted) – if, in other words, this task implies negotiating a path between a historical-materialist perspective and a sensibility to other-than-capitalist 'languages', structures of temporality and of rebellion – then these reconstructions must necessarily deal with translations and mistranslations, with the equivocations produced as well as with the encounters fostered in the realm of class struggle, which is the ground on which emancipatory battles are fought.

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