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ROSA LUXEMBURG, IMPERIALISM AND THE GLOBAL SOUTH

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Rosa Luxemburg's Importance for Heterodox Economics and the Global South

This introduction argues not only that development economics could benefit substantially from heterodox traditions in economics, but, more importantly, that both could gain from the insights offered by the work of Rosa Luxemburg. To come to this conclusion it is necessary to take a closer look at the history of economic thought, a heterodox understanding of 'economics', the concept of surplus in Classical Political Economy, and Luxemburg's *The Accumulation of Capital*.

Rosa Luxemburg's birth in 1871 coincided with the publication of two seminal books, which define our current understanding of mainstream economics: William Stanley Jevons' *Theory of Political Economy* and Carl Menger's *Grundsätze der Volkswirtschaftslehre*. Both authors, as well as Léon Walras, are regarded as the founding fathers of the Marginalist Revolution. Similar to Marxian Economics and the German Historical School, the Marginalist Revolution was a reaction to the dominance of Classical Political Economy and in particular Ricardian Economics. Their critique dealt differently with the three main characteristics of Ricardianism, namely its liberal doctrine (progressive), Ricardo's labour theory of value (facilitating socialism), and its abstract deductive method (universal theorising). Marx formulated a critique which overhauled Ricardo's labour theory of value and which transcended the deductive-inductive divide, thanks to both a dialectical approach and his method of historical materialism. The German Historical School is best known for its inductive approach and thus challenged the universal character of Classical Political Economy. Moreover, although it advocated social reform, it did not share the liberal doctrine, which "aimed at the establishment of representative government and equality of all individuals under the law" (Mises 2003: 7).

Whereas the Marginalist Revolution embraced both the liberal doctrine as well as the abstract deductive method, it replaced the labour theory of value with a subjective theory of value, which was based on Bentham's utilitarianism (Milonakis/Fine 2009).

In the wake of the Marginalist Revolution, political economy became economics. One of the pillars of this academic (r)evolution was Léon Walras' *Eléments d'économie politique pure*, which was first published in 1874. This was also the moment that the term 'pure' was used to indicate the supposedly value-free and apolitical character of economics. Walras (1965: 51ff) is rather straightforward as he distinguishes between science, art and ethics. According to this distinction, social interactions are the subject of ethics, i.e. moral science. The subject of art is the interaction between individuals and objects and is thus an applied science. The 'pure' theory of economics, however, is concerned with social wealth, i.e. "all things, material or immaterial […], which are *scarce*, that is to say, on the one hand *useful* to us and, on the other hand, only available to us *in limited quantity*" (Walras 1965: 65). As core concepts of economics, Walras (1965: 71) identifies "exchange, supply, demand, market, capital, income, productive services and products". Although published almost 150 years ago, his definition of economics fits rather well with current, mainstream conceptualisations of economics.

When, after the Second World War, the colonial system fell apart and independent nation states in the global South re-entered the world stage, development economics emerged as a field of (mainstream) economics. In the 1950s, development was equated with GDP growth and theorised in terms of the Harrod-Domar growth model, which emphasised the need for capital for GDP growth. The development doctrine of the 1960s was based on the structural two-sector Lewis model. This model distinguished between a 'backward', agricultural sector and a modern, industrial sector. GDP growth depends in this model on the industrial sector's capital accumulation and investments as well as the performance of the agricultural sector in supporting industrialisation. In the 1970s, the tone of the debate became more critical. After two decades of failed growth strategies and worsening socio-economic conditions, focus shifted from GDP growth towards poverty alleviation. Besides a mainstream discussion on rural-urban migration, the informal sector, and population growth, this decade

also experienced an upsurge of neo-Marxist/heterodox debates on underdevelopment and dependency. The 1980s in turn witnessed the debt crisis, which opened the door for Structural Adjustment Programmes in conformance with the Washington Consensus. By means of deregulation, privatisation, and liberalisation, the Bretton Woods institutions, i.e. the IMF and the World Bank Group, forced countries to attain balance of payments and budget equilibria. The development doctrine switched towards endogenous growth models (e.g. Solow), which emphasised the importance of human capital and economies of scale, as well as towards trade liberalisation. The 1990s introduced concepts of New Institutional Economics, especially with respect to the role of the state (cf. public-choice theory or New Political Economy). In the new millennium, the development debate became aware of the complementarities between multiple socioeconomic conditions (e.g. poverty, health, urbanisation, education, investments). This multi-dimensionality was not only expressed in the Millennium Development Goals, but also in the surrounding theoretical debate. Development economics started to focus on different economic agents and possible coordination failures between them which led to multiple equilibria, which could explain concepts such as the middle-income trap or the underdevelopment trap (Thorbecke 2000, Todaro/Smith 2015: 118ff).

What makes development economics such an interesting field of study is the fact that it cuts to the core of economics. Or, to put it in the words of Nnadozie (2006: 203): "Arguably, economic development (or lack thereof) constitutes the most significant challenge facing Africa. One would therefore expect Africa, which presents the most daunting economic challenge in modern history, to occupy centre stage in the field of economics. Amazingly, economics, whose central preoccupation is income, growth, distribution, and human welfare, throughout time has either ignored Africa altogether or given it only peripheral attention." At the same time, and this could partly explain the dynamics within this field, development economics displays the main shortcoming of mainstream economics (without overcoming it). The summary of heterodox critique according to Lee (2012: 341ff) is that, due to the concepts and methods it employs, mainstream economics explain little to nothing of real-world phenomena. He even goes so far to state that "neoclassical theory is pseudo-knowledge or false knowledge" (Lee 2012: 342). Lawson (2006: 488ff) is more subtle. He argues

that the insistence upon a formalistic-deductive (i.e. mathematical) framework characterises mainstream economics. This framework implicitly and falsely assumes universal economic laws, i.e. real-world occurrences are deterministic or stochastic event regularities with clear causality.

Considering the limited viability of mainstream economic concepts in general and for development studies in particular, it is worth taking a closer look at alternatives. The following sections first discuss a heterodox understanding of economics. This if followed by the concept of social surplus. And to conclude, the insights offered by Luxemburg's *The Accumulation of Capital* are integrated into these debates.

1. Heterodox economics

Heterodox economic traditions (e.g. original institutional, Marxian, Post-Keynesian and feminist) contest the mainstream's conceptualisation of economics, which does not (and cannot) consider social processes (Lawson 2006). It is exactly these social processes which are at the centre of heterodox conceptualisations of economics. Lawson (2006: 500, footnote 1) defines economics as "the identification and study of the factors, and in particular social relations, governing those aspects of human action most closely connected to the production, distribution and use of the material conditions of well-being, along with the assessment of alternative really possible scenarios." Lee/Jo (2011: 859) state that "[e]conomics and especially heterodox economics is about developing theoretical explanations of the social provisioning process. […] Thus the social provisioning process is a continuous, non-accidental series of production-based, production-derived economic activities through historical time that provide needy individuals and families the goods and services necessary to carry out their sequential reoccurring and changing social activities through time." From a feminist perspective, Power (2004) advocates for the use of the term "social provisioning", because it stresses the significance of interdependent social processes. "To define economics as the study of social provisioning is to emphasize that at its root, economic activity involves the ways people organize themselves collectively to get a living." (Power 2004: 6) Rosa Luxemburg fits rather well in such a heterodox perspective,

not only because she adheres to Marxian economics. In the first chapter of *The Accumulation of Capital* she clearly points out that her main concern is "the reproduction of the entire social capital" (Luxemburg 1951: 31). It should be clear from these quotes that heterodox conceptualisations of economics contradict Walras' definition based on scarcity (and the mainstream definition in general), because they put social processes at the core of economics.

From this perspective it is clear that social reproduction is the core of economics as a social science. It is the study of how societies organise and secure their general survival. This includes productive activities (e.g. production of use values) alongside reproductive activities (e.g. care work). Moreover, these interdependent social processes have not only a distinct historical time component but also a definite spatial component. As discussed by Power (2004: 4f), this corresponds with a broader view of economics, in which unpaid labour, human well-being, human agency, ethical judgement and intersectionality come to the fore. This definition of economics complements critical readings of space within the field of geography, which centre on social relations. Massey (1994: 1ff) formulates space in terms of changing social relations and concludes that space is dynamic. Consequently places are "particular articulations" of "open and porous networks of social relations" (Massey 1994: 5, 121). A common element in both definitions are social processes. Therefore, concepts such as the global South and North could be regarded as such spaces, defined by social relations.

2. Social surplus

The theory of social surplus offers one approach to discuss these social provisioning processes. Based on his reading of Piero Sraffa and Karl Marx, Martins (2013) distinguishes between Classical Political Economy, Vulgar Political Economy[1], and Economics. This classification revolves around differences in the conception of value. Whereas Classical Political Economy (e.g. William Petty, Adam Smith, David Ricardo) uses an objective theory of value, i.e. value is the outcome of production conditions, Vulgar Political Economy (e.g. Jean-Baptiste Say, Thomas Robert

Malthus, John Stuart Mill) and Economics use a subjective theory of value. This latter view argues that prices and quantities are the outcome of independent supply and demand conditions and demand is derived from subjective utility. Whereas the focus of (mainstream) Economics is "the optimization of utility in the context of scarce resources" (Martins 2013: 1212), Classical Political Economy focuses on "the reproduction of a surplus produced by labor" (ibid.).

Although he does not offer a clear definition of social surplus, Martins' (2013: 1208) comment that it is divided between wages, profits and rents, as well as his references to Lee/Jo (2011), indicate a technical understanding of social surplus. In this vein Lee/Jo (2011: 858) define "social surplus as the difference between the total social product and the total amounts of intermediate inputs". The origin of this surplus they see in the agency of business enterprises and the state, which implies that total social product is the result of this agency. Moreover, this technical approach has the advantages of being more or less class-neutral and is identifiable as well as measurable (Lee/Jo 2011: 858). This becomes clear if one compares the technical definition with the definition offered by O'Hara (2015: 716): social surplus is "the 'total value' of aggregate output minus the necessary consumption of 'the people'". This definition raises the question of what is necessary and (as already indicated by the quotation marks) what is "the people"? From a Marxian perspective, social surplus equals surplus value, which is divided between interests and rents (Marx 2008b: 822ff). In this case necessary consumption equals the wage bill of labour, which is "the people", and the used constant capital (O'Hara 2015, Marx 2008a).

The social surplus approach shows that production and investment decisions of enterprises as well as governments determine the level of social surplus. This agency core is embedded in social structures such as social classes, structures of production and the state. Consequently, the distribution of social surplus is not the result of technical productivity, but the direct outcome of the agent's decisions.

3. 'The Accumulation of Capital'

How does Luxemburg fit in this picture? In *The Accumulation of Capital*, which was first published in 1913, she discusses the dynamics of capitalism, by analysing the limits of expanded reproduction. This work puts her in the tradition of Classical Political Economy. From a Marxian perspective, capitalist reproduction is characterised by the transformation process of capital: M – C … P … C' – M'. Money capital (M) is transformed into productive capital (C), which fuels production (P). This results in commodity capital (C'), which (when sold) takes its original form, money capital (G'). The *raison d'être* of this is the production of surplus value, i.e. the difference between G' and G (Marx 2008a: 164f, Luxemburg 1951: 37f). It is obvious that Luxemburg adheres to the social surplus theory. She argues that capitalist producers must create "surplus value *ad infinitum*" (Luxemburg 1951: 39). Just as Marx, she regards the value of every commodity produced as the sum of expenses on the means of production (i.e. constant capital), wages (i.e. variable capital) and surplus value (Luxemburg 1951: 37-38). Expanded reproduction implies that a share of this surplus value is invested in the production of further commodities. At this point, she formulates two important questions. First, she asks, who pays for the produced commodities? This question clearly addresses the transformation of commodity capital in money capital (C' – M'). There has to be effective demand for the produced commodities, otherwise capital accumulation would come to a halt. Without buyers, reproduction is impossible. Demand also has to increase in pace with the expansion of production, i.e. the growing volume of commodities must face equally growing demand. Second, she points out that enlarged production needs more means of production and more labour power. Here, she touches on the physical limits of enlarged reproduction (Luxemburg 1951: 43-44). The increasing amount of money capital, which is reinvested in the production process, must be transformed into productive capital. Where do these extra resources of constant and variable capital come from? Moreover, her approach corresponds to a heterodox understanding of economics. She is very specific in discussing the peculiarities of capitalist social relations. Luxemburg (1951: 32) explicitly links processes of production to technical and social conditions, which change in time and space.

Notwithstanding her virtues with respect to the discussed topics, her work was not well received by other academics. This is clearly pointed out by those authors who provided introductions to editions of *The Accumulation of Capital*. Both Eduard März (1965: Iff) and Hermann Lehmann (1990: 1*ff) argue that one major point of critique was Luxemburg's interpretation of Marx's diagram of enlarged reproduction. Although Luxemburg puts the long-term dynamics of capitalism in the centre of her analysis, she uses this diagram as a snapshot and attributes implicitly causal relations to it. This, however, makes it impossible for her to answer her research question without referring to non-capitalist strata. Joan Robinson, who wrote the introduction to the first English translation and is partially responsible for Luxemburg's academic rehabilitation, criticises Luxemburg's neglect of rising labour productivity and the effect of technical progress on the internal inducement to invest. Nonetheless, Robinson concludes her introduction with the following words: "For all its confusions and exaggerations, this book shows more prescience than any orthodox contemporary could claim" (Robinson 1951: 28).

4. Relevance for (development) economics

And still, 100 years after her (and Karl Liebknecht's) assassination, her economic (and political) ideas live on and are vividly discussed, as this special issue makes clear. This is due to the fact that she managed to address important issues, which could and should not be neglected. Even if her false interpretation of Marx forced her to refer to non-capitalist strata, the significance of these non-capitalist strata cannot be undervalued.

The emergence of economics (or political economy) is closely linked to the capitalist industrial revolution. Adam Smith, one of the founding fathers of economics, was writing in a time when social reality changed dramatically. Economic activities, which were previously located within the household, were restructured into a public, market-oriented sphere and a private, moral sphere (Pujol 1992: 16-23). Luxemburg (1951: 386, 395) would argue that capitalism pushed non-capitalist economies in England aside. Whereas economists started analysing the capitalist strata of this restructuring and transition, the non-capitalist strata were perceived as

trivial and in this sense also as non-economic. As a result, crucial aspects of social provisioning processes disappeared from the economist's agenda. Pujol (1992: 16-23) makes this argument with respect to gender roles and (female) unpaid household work, but her argument holds true in general. Luxemburg introduced these completely neglected non-capitalist strata into economics. Nonetheless, she does not explicitly discuss the relevance of these non-capitalist strata for social provisioning processes. She focusses only on their relevance for capital accumulation, which "depends in every aspect upon non-capitalist social strata and forms of social organisation" (Luxemburg 1951: 366).

From a heterodox perspective, however, Luxemburg offers a clear starting point to broaden the analysis of social provisioning processes. Her distinction between internal and external markets is very helpful in this respect, especially since she stresses that "[t]hey are both vital to capitalist development and yet fundamentally different, though they must be conceived in terms of social economy rather than of political geography" (Luxemburg 1951: 366). It is clear that Luxemburg's distinction between internal and external markets is not spatially, but rather socially defined. She defines the internal market as completely embedded in the capitalist sphere in which capitalist produced commodities (both consumer goods and elements of production) are consumed by the labour class and capitalist producers. "The external market is the non-capitalist social environment which absorbs the products of capitalism and supplies producer goods and labour power for capitalist production" (Luxemburg 1951: 366).

Besides pointing out the existence of non-capitalist strata, Luxemburg discusses their interaction with capitalism. Once again, she adheres to an approach which considers historical, social and spatial contexts. This becomes clear in chapters 27 to 29, in which she discusses natural, commodity and peasant economies. In order to get access to the means of natural economies, capitalism reverts to methods such as political force, taxation and cheap goods (Luxemburg 1951: 369ff). This discussion is supported by case studies of British India and French Algeria. A vital element of interaction between capitalism and commodity economies is means of transportation (Luxemburg 1951: 386ff). In a broader sense, she discusses here how markets for capitalist commodities are created. China functions as a case in point. The main struggle of capitalism against peasant

economies revolves around the isolation and deprivation of non-capitalist producers. Using the examples of the USA and South Africa, she argues that this political process relies on taxation, war and the monopolisation of land (Luxemburg 1951: 386ff). Throughout her argumentation Luxemburg continuously stresses the violent character of the interaction between capitalism and non-capitalist strata, for example, with phrases such as "if necessary by force" (Luxemburg 1951: 358), "primitive conditions allow of a greater drive and of far more ruthless measures" (Luxemburg 1951: 365), "systematic destruction and annihilation of all the non-capitalist social units which obstruct its development" (Luxemburg 1951: 370), "Force is the only solution open to capital" (Luxemburg 1951: 371), "a mere illusion that these are peaceful changes" (Luxemburg 1951: 386). Luxemburg is thus well aware that this interaction, in which capitalism assumes dominance, is not restricted to economic exchange relations, but also includes politics and militarism.

The contributions gathered in this special issue address these different aspects of Luxemburg's theory and show how her work can be fruitfully developed. Luxemburg was not the only theorist who developed a theory of imperialism at the dawn of the 20th century. However, she is according to Ingo Schmidt, the only one to offer basic insights into the capitalist mode of production, which can help us to understand contemporary capitalism. By contrasting Luxemburg with Lenin and Hilferding, Schmidt shows that Luxemburg understood imperialism, i.e. "the political expression of the accumulation of capital in its competitive struggle for what remains still open of the non-capitalist environment" (Luxemburg 1951: 446), as an intrinsic part of capitalism and not as a specific phase in capitalism's development. This offers the possibility to analyse the Keynesian and neoliberal phases of capitalist expansion.

Anil Shah takes a closer look at socio-ecological conflicts and uses the conflict between the South Korean Pohang Iron and Steel Company and civil society organisations in the eastern Indian state of Odisha to illustrate his case. He interprets socio-ecological conflicts as disputes between capitalist and non-capitalist social strata over the use of nature. He does not only refer to Luxemburg's work to grasp the violence inherent in this conflict, but also to Schumpeter's notion of "creative destruction" to stress the dynamics of capital accumulation. He concludes that socio-ecolog-

ical conflicts could benefit from the concept of 'destructive creation', as it explicitly links the dynamics of capitalism with the violence exerted on non-capitalist social strata.

The interaction between capitalism and non-capitalist social strata are also at the centre of Patricia Zuckerhut's contribution. From an anthropological perspective, she analyses this interaction in the specific context of the Mexican district of Cuetzalan del Progreso. Her starting point is a critique of Luxemburg. Luxemburg's theory is embedded in the Marxian/political economy tradition, which neglects realities of non-western societies. As a result, non-capitalist strata, especially in the global South, are regarded as passive and thus exposed to the dominant violence of capitalism. However, Zuckerhut displays, using the perspective of others, how non-capitalist social strata react to capitalist processes of accumulation.

The contribution of Patrick Bond addresses interactions between capitalism and the non-capitalist strata within a distinct African context. First, the non-capitalist strata is indispensable for capitalism as a reservoir of resources. This includes natural resources, which account for around a third of Sub-Saharan African countries' wealth, as well as labour power. African scholars have been discussing the nexus between wage labour (within capitalism) and social reproduction (within non-capitalist strata) since the 1960s. Bond builds on this tradition to point at the violent character of this conflict, which reveals itself in increasing riots and protests. In addition, he contextualises the rise of BRICS (Brazil, Russia, India, China and South Africa) as a manifestation of subimperialism.

To conclude, this special issue invites readers to (re-)discover the work of Rosa Luxemburg. By taking a closer look at the confrontation between capitalist and non-capitalist social strata, we can gain a more insightful understanding of social provisioning processes. Simultaneously, by including non-capitalist social strata within the social surplus theories, the production and distribution of social surplus can be discussed more thoroughly. The distinction between different social strata based on their social economy, i.e. different social provisioning processes, could be highly informative for developing economics.

1 Martins (2013: 1208) refers to unpublished works of Piero Sraffa to define vulgar political economy as the historical period from Malthus to John Stuart Mill. Sraffa borrowed this term from Marx (cf. 2008a: 20, 95 Footnote 32).

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Ingo Schmidt

Luxemburg's Theory of Accumulation and Imperialism: More than a Classic

Abstract *This article first explains the different methodological approaches of Luxemburg's theory of imperialism as compared to those of Hilferding and Lenin. It then recapitulates her main argument that capital accumulation relies on the expansion into non-capitalist environments. Based on the understanding that such expansion is not necessarily geographical, but can also occur within non-capitalist spheres and strata in countries already dominated by the capitalist mode of production, the article uses Luxemburg's arguments to explain the Keynesian and neoliberal waves of accumulation. It also demonstrates that capitalist expansion takes on historically specific forms. Each of these forms provides only so much room for expansion, once this is exhausted a major crisis occurs.*

Keywords *imperialism, expanded reproduction, accumulation by dispossession, unequal exchange, Keynesian wave of accumulation, neoliberal wave of accumulation*

1. Introduction

Classical texts on Marxist political economy, such as Rosa Luxemburg's Accumulation of Capital (1913), often leave today's readers with the impression that 'this could have been written today'. The language is slightly outdated, but the content captures very well the many facets of today's capitalist world. That does not necessarily mean though, that yesterday's theories are appropriate tools to understand today's world. It could be sheer coincidence that something written in the past still reso-

nates today. The context in which such classics were written was certainly radically different from the context in which one reads them today.

The fact that ruling circles openly embrace the notion of imperialism these days, after avoiding it throughout the Cold War (Foster 2006: 67ff.), also does not necessarily mean that it is time to go back to the classical theories of imperialism. This could also be a reason to advance new theories of imperialism. In fact, that is exactly what happened around the time of the war on Iraq, which coincided with the Western ruling classes, the US ruling class showing the way, openly embracing imperialist policies. Some of those new theories of imperialism drew more or less loosely on older theories (Foster 2006, Harvey 2003), including the classics by Luxemburg (1913), Lenin (1916) and Hilferding (1910). Others advanced entirely new theories, either because they considered older theories erroneous right from the time they were developed (Milios/Sotiropoulos 2009), or because capitalism and imperialism after the Cold War were considered to be so different from earlier incarnations that older theories could not contribute anything to the understanding of their latest stages (Robinson 2004; Wood 2003).

A few decades earlier, Marxists who tried to make sense of neocolonialism in the face of the standoff between Western capitalism and Soviet communism, also pondered the question of whether classical theories of imperialism, developed against the background of colonial expansion and imperialist rivalries, could contribute anything to their analyses or whether they should be replaced with entirely new theories.

Most of the references to classical theories in later waves of debate about imperialism considered the classical theories as more or less appropriate analyses of the age of empire, which lasted, according to Hobsbawm (1989), from 1875 to 1914, and then asked how many of the conditions analysed in those theories still prevailed during and after the Cold War eras. Although these debates were imbued with controversies over the pros and cons of the classics, the classic analyses of imperialism were almost always considered as theoretical expressions of a certain stage of capitalist development. This made a lot of sense with regards to Hilferding and Lenin, who explicitly devoted their analysis of imperialism to the then latest stage of capitalism. They understood Marx's *Capital* as an analysis of the capitalism of Marx's day and thought that in order to account for the histor-

ical changes that had happened since those days, they had to refine Marx's conceptual framework (Schmidt 2017). Hilferding's historical reading of *Capital* led him to the theoretical fusion of industrial and money capital into finance capital to make sense of the then new empirical phenomenon of cartels and trusts. Lenin followed the same method when he explained the fact that some layers of the working class could escape the immiseration that Marx had predicted, with hints at colonial exploitation. This intuition was later developed into various theories of unequal exchange between centres and peripheries (Amin 1974; Emmanuel 1972; Frank 1969; Smith 2016). In a similar vein, Hilferding's *Finance Capital* was further refined to analyse the realities of today's global finance (Chesnais 2017; Lapavitsas 2013).

Unlike Hilferding and Lenin, Luxemburg's approach to imperialism does not rely on a historical reading of Capital. She found in Capital exactly what Marx promised to lay bare – the law of motion of modern society. She also understood that Marx connected the development of the capitalist mode of production (cmp) with the development of a world market and saw her theories of accumulation and imperialism as a continuation of Marx's work, a thinker who had derived the logic of capital but did not look at its historical unfolding in non-capitalist environments. Marx, according to Luxemburg's reading of Capital, tried to carve out the mechanics of accumulation by the use of equilibrium conditions that demonstrated the possibility of unlimited accumulation. However, he did not claim that these theoretical conditions would be met in reality. In order to analyse the expansion of the cmp in non-capitalist environments, Luxemburg had to replace Marx's assumption of a closed capitalist economy with a theoretical model that does not consider exchanges between capitalist and non-capitalist economies as accidental, but rather understands the expansion of the former into the latter as a necessary condition of capital accumulation. This approach has drawn sharp criticism ever since the *Accumulation of Capital* was published.

Luxemburg's critics understand the equilibrium conditions that Marx uses in his analyses of expanded reproduction as a proposition about capitalist reality and deny that accumulation would be restricted by insufficient demand (Zarembka 2002). However, such a priori rejections of Luxemburg's theory are at odds with empirical observations that show that longer

periods or waves of accumulation went hand in hand with expansion into non-capitalist environments (Dörre 2015, Feliz 2014). Empirical observation also shows that such periods came to an end when the specific forms this expansion had taken in each of these periods were exhausted (Schmidt 2012 & 2014). It should be noted here that Luxemburg was not interested in business cycles, which may be explained by the internal mechanics of capitalist accumulation alone but sought instead to explain the long-term trends of capital accumulation (Luxemburg 1913: 12f.).

Key to capital accumulation, as Luxemburg understood it, was the opening up of markets in non-capitalist environments, no matter where these could be found. During her lifetime, one such place was the countries outside Western Europe and North America where industrial capitalism was already dominant. Imperialism, which Luxemburg (1913: 325) defined as the "political expression of the process of accumulation of capital in its competitive struggle over the unspoiled remainder of the non-capitalist world environment," was a specific form of opening up new markets. It also established relations of domination and exploitation between the imperialist empires and their colonies that were later transformed into relations between imperialist centres and peripheries or, in Magdoff's (2003) terms, an *Imperialism Without Colonies*. In the late 19th and early 20th century, the opening of new markets and imperialism coincided. Analytically, though, they are not the same. Imperialism is about the dominance of some states over other states or regions and the rivalries between the dominant states. Since the late 19th century, imperialism went through its original colonial stage through a period of neocolonialism during the Cold War to the super-exploitation inscribed into today's global production networks. Parallel to these transformations of imperialism, capital has penetrated non-capitalist environments in private households, subsistence farming, and through the privatisation of public enterprises since the days of Luxemburg.

This article will briefly present the theories of accumulation and imperialism that Luxemburg advanced just before the colonial conquest turned into imperialist rivalries that ended the colonial wave of accumulation. The article will then use these theories to explain the subsequent Keynesian and neoliberal waves of accumulation, including the limits of capitalist expansion into non-capitalist environments that contributed to the end of both waves. What should be stressed in this respect is that capitalist expan-

sion includes the geographical expansion of the cmp into non-capitalist territories, and the gradual replacing of non-capitalist spheres and social strata within countries already dominated by the cmp. The latter became particularly important after WWII, when the commodification of household production challenged previously existing gender divisions of labour that were further modified, and also racialised, during the neoliberal wave of accumulation that brought about the privatisation of public services and culminated in a crisis of social reproduction that contributed, along with financial crises, to the end of this wave. What should also be noted is that Luxemburg's theories are focused on 'first contact' between capitalist and non-capitalist activity. She does not look at the unequal relations and exchanges that the colonisation of the South, of private households, and of the environment bring about (Foster/Holleman 2014). Neither does she look at gendered and racialised labour market hierarchies in the global division of labour (Mies 1999). Analyses of these inequalities and discriminations are, however, compatible with her analyses (Čakardić 2017).

2. Luxemburg on capital accumulation and imperialism

From her reading of Marx's analysis of the exchanges between and within the departments producing means of production and means of consumption, respectively, in *Capital II* (Marx 1885), Luxemburg (1913: 7-117) concluded that capital accumulation in a purely capitalist economy would come to a standstill because of a lack of aggregate demand. Expansion into non-capitalist societies, by providing additional demand to realise the surplus produced under the reign of the cmp, would be the only way to overcome this impasse. The logical end result of capitalist expansion into non-capitalist societies would be the emergence of a pure capitalist economy suffering from the lack of demand that Luxemburg had identified as the key constraint of capital accumulation. However, this logical argument needs to be distinguished from the historical unfolding of the cmp within non-capitalist societies. What is important to understand is that the historical development of capitalism does not proceed from subjecting all economic activity within one country to the cmp before moving on to another, still non-capitalist, country. Luxemburg (1913: 221f.)

argued that capitalist production "from its infancy […] begins to produce for the world market. In the UK, its various pioneering branches, such as textiles, iron, and coal industries, sought out markets in all countries of the world long before the process of the destruction of peasant ownership, the ruin of handicraft production and of the old forms of cottage industry had run their course." She did not explain why this is so, but one could argue that domestic markets in the countries where capitalist industries first developed were too limited to allow those industries to operate on a profitable scale.

What follows from the empirical observation that world markets already began to develop at a time when the centres of capitalist production still coexisted with extended non-capitalist spheres is that, analytically, we have to carefully distinguish between foreign trade, relating to trade between nation-states, on the one hand and internal and external markets on the other.

> "Internal and external markets certainly each play a great role (…) in the course of capitalist development – not as concepts of political geography, however, but rather as ones of social economy. From the standpoint of capitalist production, the internal market is the capitalist market (…). The external market (…) is the non-capitalist social environment, which absorbs its (capitalist production's) products and supplies it with elements of production and labour power." (Luxemburg 1913: 263f.)

Luxemburg recognised that "after several centuries of its development, the cmp as such still constitutes only a fraction of total world production." She also recognised the "contradictory phenomenon" that, as far as capitalist production is concerned, "the old capitalist centres represent ever-greater markets for one another and become ever more indispensable for one another, even as they contend with each other ever more jealously as competitors vis-à-vis the non-capitalist countries." (Luxemburg 1913: 257, 264). The reason for this is that, in her day, the demand stimulus that allowed capital accumulation, including large trade volumes between the capitalist centres, came, to a certain degree at least, from establishing capitalist outposts in the colonies.

One of the means used in this struggle is international credit (Luxemburg 1913: 304-324). It helps economic agents in non-capitalist societies to buy commodities from the capitalist economy, but also forces them into a "commodity economy" where commodities are produced for market sale but without this production being subjected to the imperatives of capital accumulation (Luxemburg 1913: 279-285). However, more often than not, exchange with the capitalist economy drives commodity economies into bankruptcy, as they either cannot compete or do not make enough money within the commodity economy to continuously purchase from the capitalist economy and pay back their initial loans. The other means of capitalist expansion and imperialist rivalries is political violence. Military might is displayed to force non-capitalist societies into economic exchange with the capitalist centres, but is also a part of the competitive struggle for colonial possessions between the centres. Beyond that, the military "constitutes a preeminent means for the realization of surplus value – i.e. as a sphere of accumulation." (Luxemburg 1913: 331)

Luxemburg assumed that arms spending is entirely financed through indirect taxes that fall largely on working classes and non-capitalist social strata, such as peasants and artisans, in the centres. Summarising the effects of militarism within the centres and the colonial world, she wrote,

> "The more forcefully capital uses militarism in order to assimilate the means of production and labour power through foreign and colonial policy, the more powerfully the same militarism works progressively to wrest purchasing power at home, in the capitalist countries themselves, from the non-capitalist strata (…) and from the working class. It does this by robbing the former of their forces of production on an increasing scale, and by reducing the standard of living of the latter, in order to increase the rate of accumulation of capital enormously at the expense of both."

Accumulation based on colonial expansion abroad and the capitalist penetration of non-capitalist spheres in the centres, Luxemburg concluded, will turn the

> "day-to-day history of capital accumulation on the world stage (…) into a continuous series of political and social catastrophes and convulsions, which, together

> with the periodic economic cataclysms in the form of crises, will make it impossible for accumulation to continue, and will turn the rebellion of the international working class (…) into a necessity, even before the latter has come up against its natural, self-created economic constraints." (Luxemburg 1913, 341)

Luxemburg's analysis of taxation and government spending is rather sketchy, but it does offer a starting point for a more complete analysis of the macroeconomics of fiscal policies. Such analyses, for example by Kalecki (1969), which developed in the tracks of Luxemburg's theory of accumulation and imperialism, became increasingly important in order to understand the effects of state intervention in welfare and developmental states, respectively, during the post-WWII-era. Closely related to the economic effects of the rise of these two types of Keynesian states in the centres and post-colonial peripheries, is the question of to which degree economic development in the peripheries was hampered by neocolonial exploitation. Focusing on capitalist expansion into non-capitalist societies, Luxemburg did not pay much attention to the economic development of such societies after they became part of, in her nomenclature, the internal, i.e. capitalist, market. In fact, colonies' ability to absorb products made in the capitalist centres, and hence their contribution to capital accumulation, was quite limited. With decolonisation after WWII, the question arose whether post-colonial economies could develop beyond their peripheral status and, if so, who would reap the fruits of such development.

Understandably enough, theories of imperialism in the age of decolonisation focused quite intently on the distributional struggles within post-colonial regimes and between those regimes and the imperialist centres. However, the fact that, at that time, colonisation, i.e. the expansion of the capitalist centres into non-capitalist societies, had been replaced by a hierarchical capitalist system with its patterns of neo-colonial exploitation, does not mean that capitalist expansion into non-capitalist spheres and social strata had stopped. As a Luxemburgian perspective on imperialism during the age of de-colonisation reveals, welfare and developmental states had a dual character: while providing social protection for the subordinate classes, they were also spearheads of capitalist expansion within centres and peripheries.

3. Imperialism during the Keynesian wave of accumulation

Decolonisation and the Cold War rendered the classical theories of imperialism obsolete, or so it seemed. If any of the old ideas could contribute to the understanding of these new conditions, it was certain of Hilferding's and Lenin's (Baran/Sweezy 1966: 4ff.). Hilferding's analysis of the relations between capital and the state could be used as a starting point for a closer look at welfare and developmental states. Lenin's off the cuff remarks about imperialist rents inspired various theories of unequal exchange between centres and peripheries. Some of these (Amin 1974) drew on Hilferding's argument that finance capital evades the equalisation of profit rates and thereby appropriates parts of the surplus value created in firms operating under competitive conditions. This argument was then applied to the capitalist world-system, with the centres being the home basis of finance capital and competitive conditions prevailing in the peripheries. Other theories (Emmanuel 1972; Smith 2016) contended that the value of labour power was not the same in centres and peripheries and that the hierarchical relations between them stood in the way of its equalisation. Different theoretical approaches notwithstanding, what the Neomarxist theories of imperialism had in common was a focus on the redistribution of wealth from peripheries to centres within the, in Luxemburg's terms, internal or capitalist markets.

At the same time, the economic mainstream was mostly concerned with Keynesian possibilities. In the centres, these were found in demand management used to smooth business cycles and, depending on political persuasion, advocacy for, or dismissal of, state-moderated income moderation and the provision of public services. In the peripheries, the Keynesian state was seen as a key driver of industrialisation. From this perspective, decolonisation and the rise of Keynesian states in centres and peripheries dissolved the imperialist, understood as colonial, world system.

However, neither the Keynesian mainstream, that viewed theories of imperialism as obsolete in an age of welfare states and developmentalism, nor the Neomarxists, who pointed at new forms of imperialism, recognised the Luxemburgian aspects of capital accumulation during the post-WWII-period. Rather than the centres of industrial capitalism colonising an outside world and thereby turning it into its own periphery, as during

the age of empire, the Keynesian wave of accumulation was marked by parallel processes of capitalist expansion within both centres and peripheries. Luxemburg's theory of imperialism is often so associated with colonisation during the age of empire that it is difficult to see how her analyses can contribute to the understanding of capitalist developments after that age had come to a close. The picture changes, though, if one remembers that underlying her analysis of the historically specific form of accumulation during the age of empire was a general theory of capital accumulation that can also be used to analyse other historical forms, or waves, of accumulation (Schmidt 2012).

With this in mind, it can be shown that the Neomarxist focus on unequal exchange and the Keynesian focus on state intervention explain significant parts of the Keynesian wave of accumulation but also miss two key aspects. One is the already mentioned capitalist expansion into non-capitalist spheres and social strata in centres and peripheries. The other is the role that the Keynesian state played in driving this expansion. Keynesian analyses see states largely as a countervailing power to the self-destructive tendencies of unbridled markets; neoclassical economists later used this states-against-markets framework as a starting point for their efforts to dismantle the welfare and developmental aspects of the state and reduce it to its function of securing private property rights. What is missing from this state-versus-market controversy (Schmidt 2008: 7ff.), but also from most Marxist analyses, is an understanding that the expansion into non-capitalist spheres and social strata contributed to the Keynesian wave of accumulation and thereby provided the underpinnings for the protective role that states also acquired during that period.

Industrialisation in the peripheries, proceeding at very different speeds and with foci on different economic sectors across the postcolonial world, was not only a state-sponsored project (Kohli 2004) but also one that opened new markets. In doing so, it, in Luxemburg's terms, helped to replace "natural economies" with "commodity economies" and to dissolve "peasant economies" in separate spheres of agricultural production and manufacturing (Luxemburg 1913: 265-303). However, the integration of newly created commodity producers into the circuits of global commodity exchange also exposed them to competition from firms operating on much larger scales and with greater abilities to develop new tech-

nologies. As in Luxemburg's day, international credit was one of the means used to dissolve natural and peasant economies. Additionally, postcolonial regimes which tried to break break away from the transformation of colonial deliverers of natural resources and agricultural products into semi-industrialised peripheries to the capitalist centres often faced, as in Luxemburg's days, military intervention.

At the same time, states in the centres supported capitalist expansion into private households. Household production relied increasingly on labour-saving technologies such as refrigerators, washers and vacuum-cleaners, bought from capitalist manufacturers. Though consumer credit helped to fuel the rapid diffusion of these technologies, a lasting effect of this diffusion was a permanent increase of labour supply, mostly female, as increasingly commodified household labour required increased monetary incomes. The capitalist penetration of private households created double shifts for many women who kept on doing most of the housework and found employment in the lower tiers of private labour markets but also in a burgeoning public sector where they would do much of the care work they also did at home – except now for money (Kessler-Harris 1981: 51ff.; Schmidt 2014: 464f.).

Production and care were not the only aspects of private households' lives where commodification increased by leaps and bounds during the Keynesian wave of accumulation. The same was true for leisure time activities, leading to increasing sales of radios and TV sets, as well as higher attendance at commercial sports events and concerts. If militarism "constitutes a preeminent means for the realization of surplus value" (Luxemburg 1913: 331), the same is true for the promotion of a lifestyle based on mass consumption (Baran/Sweezy 1966: 112ff.). And, of course, the military continued to constitute such a means as well, even though the military buildup was no longer spread amongst competing imperialist powers but was concentrated in the US, which led the capitalist centres in their Cold War efforts (Baran/Sweezy 1966: 178ff.). This shift from imperialist rivalries to a US-led collective imperialism (Schmidt 2008: 28ff.) eventually led to tensions between the imperialist centres, since the high concentration of military build-up in the US, though providing an outlet for the realization of surplus value. The emergence of an military-industrial complex in the US also helped to and maintain imperialist rule and allowed other

countries, particularly Germany and Japan, to build export industries that gained a significant share of the burgeoning mass consumer markets, while the competitiveness of US manufacturing, outside of arms production, aviation and information technology, began lagging behind (Brenner 2006; Kidron 1968).

As with the age of empire, the Keynesian wave of accumulation produced a "series of political and social (…) convulsions" and "periodic economic cataclysms" that made it "impossible for accumulation to continue" (Luxemburg 1913: 341). These limits to accumulation were specific to, and shaped by, the forms which accumulation had taken in the preceding period. The emergence of Germany and Japan as major export economies produced overcapacities in a series of manufacturing industries, overcapacities that threatened profits on the demand side. At the same time, escalating demands for higher wages, welfare state expansion and, in some postcolonial countries, resistance to neocolonial exploitation and the complementary quest for a new international economic order, threatened to squeeze profits on the supply side. The movements that raised these demands challenged the rule of capital but were unable to overcome it. The defeat of left movements from the coup in Chile to the election of Thatcher and Reagan (Harvey 2005: 5-63, Schmidt 2011) allowed capital and the state to use the debt buildup that had accompanied the crises-ridden 1970s as a trigger for the long-term project of rolling back the social protections granted by welfare and developmental states, and to create new "means for the realization of surplus value" (Luxemburg 1913: 331), notably the privatisation of public services and state-owned enterprises.

4. Imperialism during the neoliberal wave of accumulation

What started as a process of privatisations enforced by fiscal and foreign debt crises in capitalist centres and peripheries, culminated in the collapse of Soviet communism and China's full-scale reintegration into capitalist markets. To many left theorists, this meant that the world market had eventually been completed. With reference to Luxemburg, Hardt and Negri argue that the outside on whose penetration capital accumulation had been reliant for so long had been fully internalised. Reading Luxem-

burg as a theorist of the geographical expansion of capitalism, they argue that the completion of the world market does not represent "natural, self-created economic constraints" (Luxemburg 1913: 341) to the rule of capital, but simply a reason for a switch from extensive accumulation and formal subsumption to intensive accumulation and real subsumption (Hardt/Negri 2000: 221-229 & 272). Such views were not uncommon amongst critical theorists during the heyday of neoliberal globalisation, but conceal more than they explain.

First of all, they conceal the fact that the Keynesian wave of accumulation relied on capitalist expansion into non-capitalist spheres and social strata even if the world market, in geographical terms, had been diminished in the face of Soviet and Sino communist expansion during the 1940s. They further conceal the fact that, notwithstanding the neoliberal rollback of their welfare and developmental side, capitalist states still control significant parts of the economy and thereby continue to stabilise capital accumulation to some degree. Finally, views such as Hardt's and Negri's ignore the fact that the geographical expansion that did occur in the early 1990s was not the result of capitalists seeking outlets to realise surplus value in non-capitalist societies. It happened because the collapse of Soviet communism and China's subsequent turn to world market integration invited capitalists to sell and invest in the vast territories from East Berlin to Vladivostok and Guangdong. During the Cold War, systemic competition between Western capitalism and Eastern communism saw the latter mimicking Western models of consumption and production, however, this happened almost entirely under the auspices of state ownership and bureaucratic rule. Economic exchanges with the capitalist world were very limited. Conversely, the collapse of Soviet communism or, in the case of China, the opening?? to capitalist markets opened huge investment and sales opportunities for Western companies (Hung 2016: 52-83; Kagarlitsky 2008: 304-323).

The transition from the Keynesian to the neoliberal wave of accumulation occurred because the specific forms that enabled accumulation during the Keynesian wave produced economic and political crises that made the continuation of accumulation in these forms impossible. The neoliberal wave transformed some of the forms from the Keynesian days but also produced new ones. The point that sets Luxemburg apart from

most other Marxists is that she focuses on the expansion into non-capitalist spheres and social strata as a pre-condition for capital accumulation. Harvey (2003), despite bringing Luxemburg back into Marxist debates, stressed the dialectic between expanded reproduction and expansion into non-capitalist spheres and social strata, which he labelled accumulation by dispossession, but dissolved this dialectic into a historical sequence dominated either by expanded reproduction, during the Keynesian wave of accumulation, or, during the neoliberal wave, accumulation by dispossession (Harvey 2003: 153, 172, 176). Though he rejected the idea that late 20th century capitalism had internalised all of its outsides (Harvey 2003: 140f.), this sequencing is closer to Hardt/Negri's (2000) theory of different stages of capitalist development than to a theory of specific forms of accumulation that, at all times not marked by economic crises, connect expanded reproduction and accumulation by dispossession.

With regards to spurring capital accumulation, privatisations of public services and state-owned enterprises became a defining feature of the neoliberal wave of accumulation. Even where they were not pursued across entire economies, as in the former communist countries, they affected a whole series of sectors, ranging from airlines, railways and ports to telecommunications and mail services, water and power supplies, housing, health care and education (Frangakis et al. 2009; Mercille/Murphy 2017).

The cuts in public welfare produced a veritable crisis of social reproduction. These cuts meant that more care work had to be provided by unpaid labour at home, or needed to be privately purchased. Of course, this latter option was only available to upper and middle class families and created a highly racialised and under-privileged class of precarious care workers. Women cut off from public services and forced to work in the growing private care sector effectively had to work the longest double shifts as, after doing their paid work, they still had housework to do (Fraser 2016).

Privatisations offered investment opportunities and expanded markets. Government debt was a key lever to enforce privatisations. In the capitalist centres, domestic capitalist classes presented public deficits as a threat to state solvency and used this threat to push, along with social spending cuts, for the sale of public assets in order to reduce government deficits and debt. In the peripheries, where many postcolonial regimes had taken out cheap loans to further their developmentalist agenda, a coalition of lenders from,

and international organizations dominated by the centres used the foreign debt crisis to push for privatisations from the early 1980s onwards. Ironically, the US, whose current account deficits and foreign debt was widely seen as a harbinger of imperial decline in the 1970s, managed to reinvent themselves as the leader of the imperialist centre by turning their financial and state institutions into the nerve centre of global finance (Gindin/Panitch 2013). This allowed the US to finance escalating foreign deficits while other centre states had to prove their creditworthiness.

For the peripheries, debt service became an important form of imperialist exploitation, with only tiny minorities in those countries participating and benefiting from it. It contributed to the continued destruction of natural and peasant economies. In order to raise foreign exchange incomes, subsistence farming had to make room for the expansion of cash crop production and natural resource extraction. This is a pattern of debt-enforced integration into the capitalist market that Luxemburg, using the examples of Egypt and Turkey, had already described in quite some detail (Luxemburg 1913: 309f., 312ff.). She opened the respective chapter on *International Credit* in the *Accumulation of Capital* with the claim that the "imperialist phase of capital accumulation comprises the industrialization and capitalist emancipation of capital's former hinterland." (Luxemburg 1913: 304) In her days, industrialisation in the colonies was largely confined to the building of railways and ports so that agricultural products and natural resources could be shipped to the imperialist centres. However, referring to Canada, South Africa and the US, Luxemburg also pointed at settler-colonialism (Horne 2018), a form of colonialism that allowed peasants who had lost their land but could not find work in the burgeoning industries in their countries of origin to recreate peasant economies outside the imperatives of capital accumulation. This happened at the expense of indigenous populations and, in the US case, alongside the establishment of slave plantations. Whereas these plantations were part of global cotton capitalism right from the start (Beckert 2014), the recreated peasant economies would be transformed into capitalist farms only with the industrialisation of the settler-colonies, which, as it turned out, coincided with the last wave of colonial conquest before WWI. Yet, colonies dominated by resource extraction saw hardly any industrialisation before they won political independence. When that happened during the Keynesian wave

of accumulation, most of the postcolonial regimes pursued further industrialisation. Some, in order to circumvent competition from the centres, also sought varying degrees of emancipation from the capitalist world market. During the neoliberal wave of accumulation, debt became a lever to roll back efforts to advance non-capitalist industrialisation. This rollback integrated public enterprises into the internal or capitalist market and thereby contributed to its expansion. At the same time, the opening to world market competition, enforced by the IMF's structural adjustment agreements, allowed corporations, almost all of them headquartered in the centres, to also take over private industries in the periphery or in their home markets (Chossudovsky 1997).

The change from import substitution industrialisation to export-led growth that accompanied the transition from the Keynesian to the neoliberal wave of accumulation did not mean the end of industrialisation in the peripheries but did entail a major change in its character. Even where the internationalisation of corporations did not extend to ownership of subsidiaries in the periphery, they established themselves as centres of production networks that would appropriate surplus value created in subordinated production facilities in the peripheries (Smith 2016). As a result, a large part of manufacturing processes that were not automated moved from the centres to the peripheries. This global restructuring of production processes necessitated investments in logistics networks, i.e. new ports and railways, and the associated information technologies required to manage global production and transportation. The same restructuring processes allowed some peripheral countries, which, it must not be forgotten, had never been a homogenous group, to either maintain or acquire the status of subimperialist countries. This opened the question of whether these countries, or a group of them, would challenge the imperialist power of the old centres or whether they would reinforce this power by playing the role of junior partners (Bond/Garcia 2015). If any of the emerging economies could seriously challenge the power of the old imperialist centres, it would be China. Like Brazil, Russia, India and South Africa, it is a regional power (Schmidt 2008), but its economy has a global reach. Unprecedented growth since the early 1990s made it the second largest economy in the world. After the world economic crisis of 2008/9 it became the main engine of global recovery. Some Chinese corporations established themselves as

global players and technological leaders. At the same time, Western corporations still used China as a manufacturing hub that offered cheap labour and a well-developed infrastructure serving Western controlled supply-chains. The contradiction between the economic power represented by the Chinese state and the continued super-exploitation by Western as well as domestic corporations is mirrored by the uneasy co-existence of capitalist and state-socialist relations of production in China (Schweickart 2015). These economic and political contradictions put China in a key position with regards to the future developments of global capitalism, with options ranging from China establishing itself as an alternative to the Washington Consensus, possibly even opening paths towards forms of non-capitalist developments (Arrighi 2007), to crises made in China being exported to the rest of the world (Li 2016).

Of course, the very possibility of China challenging US hegemony only arose once the unilateral moment and the plans for a New World Order or New American Century had run their course (Arrighi 2007; Hung 2016; Li 2016; Schmidt 2010). Beginning in the 1980s and climaxing in the aftermath of the Cold War, the complementary explosion of debt and financial assets served as a door-opener into non-capitalist spheres and social strata and as a lever to enforce higher rates of surplus value. Debt and financial crises from Latin American and African peripheries in the 1980s to East Asia's newly industrialising countries and post-communist Russia in the late 1990s produced hardships for the popular classes in the affected countries but allowed Western corporations to extend their reach into new markets. These crises also triggered privatisations and thereby furthered the process of accumulation by dispossession.

In the 2000s, however, financial crises turned inwards. Rather than extending the imperialist power of the system's centres and drawing non-capitalist spheres and social strata into the orbit of capital, they increasingly hurt middle and working classes in the centres. This was the case after the bursting of the dot.com-bubble in 2001, after the 2008/9 financial and economic crises, and also after the Euro crisis in 2010. Prior to these crises, the rollback of wages and social spending in the centres had been softened by the import of cheap consumer goods made under conditions of super-exploitation in the new manufacturing districts of capitalist peripheries. At the same time, though, the privatisation of health care and

education, along with market-based pensions and cheap mortgages, had drawn significant layers of the centres' popular classes into debt and financial investments. The imperialist spoils of cheap consumer goods paled compared to the losses incurred by these classes, albeit highly unevenly across Western countries, in the aftermath of financial crises in the 2000s (Foster/ McChesney 2012; Konings 2010).

The eye of these financial and economic storms was, apart from the Euro-crises that ravaged some of the Euro-zone's internal peripheries, the US. Considering its central position in global finance, this is not a surprise. Things were aggravated by the equally dominant position of the US military. Already during the Keynesian wave of accumulation, the US found out that military dominance can be an economic disadvantage. Providing a "preeminent means for the realization of surplus value" (Luxemburg 1913: 331) does not mean that economic resources could not have been invested more profitably in other sectors. More rapid productivity growth in Germany and Japan, where manufacturing was heavily concentrated in export industries, than in the US, with its enormous military-industrial complex, suggests that this was the case during the Keynesian wave of accumulation (Kidron 1968). During the neoliberal wave, the US-led wars for a new world order and against terrorism created disorder more than anything else. These wars might have been good business for arms manufacturers, but they were not good for the capitalist world system, since disorder increases the risk of doing business. This was not only the case in the countries that were attacked by US-led armies but, in very different ways, also in the imperialist heartland (Brenner 2006; Hossein-Zadeh 2006). Runaway costs of war led to escalating budget deficits, which, in turn, provoked the loose monetary policies that fueled the housing boom, whose collapse started the 2008/9 financial and economic crises (Bilmes/ Stiglitz 2008). The same cost pressures lead to US demands to share the burden of maintaining the imperialist order more evenly amongst the old centre states. Such quarrels fed into feelings of anxiety that emerging economies, most notably, of course, China, would undermine rather than strengthen the dominant position of the old centres (Ferguson 2014).

As a result, the self-confidence and coherence that global elites had demonstrated during the heyday of neoliberal globalisation faded. Tensions within their own ranks were deepened by a growing number of politicians

who responded to the growing discontent with the internationalism of capitalism at the expense of the world's popular classes with protectionist off gestures (Schmidt 2016). In Luxemburg's time, the turn from free trade to protectionism was a result of the national ruling classes rallying around national projects of empire building (Luxemburg 1913: 325-330). By contrast, today's ruling classes are caught by the economic instability and discontents that neoliberal globalisation and the associated processes of accumulation have produced.

5. Conclusion

Luxemburg's claim (1913: 328) that free trade is a "specific form of the defenselessness of non-capitalist countries" may have been true in her time and is so again in the days of neoliberal globalisation. The same is true for her proposition that "free trade would not constitute more than a fleeting episode in the history of capital accumulation" (Luxemburg 1913: 327). However, the protectionism of today is very different from that during the age of empire. It is not driven by national projects of building colonial empires, but by the inability of global elites to maintain the free trade consensus, around which they established their dominant position from the 1980s to the 1990s. Currency and trade wars, or just the threat thereof, and the shift from supranational trade agreements to binational relations, as well as exit from the EU – itself a neoliberal project par excellence – indicate an increasing fragmentation of the capitalist world market that adds to the risks of finance-driven accumulation in both its aspects, expanded reproduction and accumulation by dispossession.

However, the fact that seemingly timely arguments, such as Luxemburg's arguments about the turn from free trade to protectionism, only apply in variegated ways in today's world is a reminder that there is no short-cut from old theories to an understanding of current issues. What makes Luxemburg's theory a starting point for the analysis of contemporary imperialism is not that many of her arguments seem like accurate descriptions of current phenomena, but that she offers a general theory of accumulation that, unlike other Marxist theories of accumulation, recognises the systematic connection between expanded reproduction within the cmp

and capitalist expansion into non-capitalist spheres and social strata. This general theory can be used as a framework within which specific historical forms of capital accumulation and imperialism can be analysed.

Since the 'original colonisation' of the then non-capitalist countries, culminating in the age of empire with its imperialist rivalries, created centre-periphery relations, imperialist exploitation has become an aspect of expanded reproduction on a world-scale. The forms in which this occurred changed from the age of empire to the Keynesian and neoliberal waves of accumulation. The respective transformations occurred within a hierarchical capitalist market. At the same time, the expansion into non-capitalist spheres and social strata also changed its form through these different waves of accumulation. In fact, this expansion was a key factor that made accumulation possible. The forms it took at various times also produced specific limits to further accumulation. Other Marxist theories of imperialism see this expansion as a characteristic of the age of empire, possibly emerging resurgent as accumulation by dispossession in the days of neoliberal globalisation. Only a Luxemburgian perspective allows us to see that the expansion into non-capitalist spheres and social strata is an indispensable part of capital accumulation at all times, and that limits to such expansion, whatever their specific historic forms may be, lead to accumulation crises.

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Abstract *Dieser Artikel beginnt mit einer Erklärung der methodologischen Unterschiede in den Imperialismustheorien Luxemburgs, Hilferdings und Lenins. Danach wird Luxemburgs Kernargument, demzufolge die Kapitalakkumulation von der Expansion in nichtkapitalistische Milieus abhängt, rekapituliert. Ausgehend von dem Verständnis, dass diese Expansion nicht notwendigerweise geografisch zu verstehen ist, sondern auch innerhalb nichtkapitalistischer Milieus in Ländern erfolgen kann, die bereits von der kapitalistischen Produktionsweise dominiert werden, verwendet dieser Artikel Luxemburgs Argumente zur Analyse der keynesianischen und der neoliberalen Welle der Akkumulation. Dabei wird gezeigt, dass die kapitalistische Expansion in jeweils spezifischen historischen Formen erfolgt. Jede dieser Formen öffnet bestimmte Räume der Expansion, deren Ausschöpfung zu einer großen Krise führt.*

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Luxemburg Meets Schumpeter: Understanding Contemporary Socio-Ecological Conflicts as Processes of Destructive Creation

Abstract *This paper develops a theoretical framework to understand contemporary socio-ecological conflicts in the context of capitalist development. Drawing on almost 2,400 cases mapped in the Environmental Justice Atlas (EJA), it outlines major characteristics of these struggles. It is suggested that these struggles are best understood as class struggles of a distinct form. While traditional class struggles focus on the capital-labour relation situated in the visible zone of commodity production, socio-ecological conflicts are analysed through a reinterpretation of Rosa Luxemburg's theory of imperialism as value struggles between capitalist and non-capitalist modes of (re)production. The implications for capitalist development are highlighted by introducing the inversion of Joseph Schumpeter's famous Creative Destruction, thus Destructive Creation. As frontier-making processes, these conflicts are conceptualised as dynamic limits to capital and therefore are an important terrain for socio-ecological transformation.*

Keywords *creative destruction, primitive accumulation, socio-ecological conflicts, environmental justice*

"Accumulation is more than an internal relationship between the branches of capitalist economy; it is primarily a relationship between capital and a non-capitalist environment […]" (Luxemburg 2003: 398).

1. Introduction: At the frontier of anti-imperialism

The 17th of March 2017 will remain a memorable day for the small farmers, forest dwellers and fisherfolk in the Jagatsinghpur district in the eastern Indian state of Odisha. After close to 12 years of firm resistance, the South Korean Pohang Iron and Steel Company (POSCO) announced its decision to withdraw from their plans to build an integrated steel plant. The POSCO Pratirodh Sangram Samiti (PPSS, The People's Movement Against POSCO) had mobilised against the plans since their inception in order to protect people's livelihoods, as well as the environment. The area is characterised by a vibrant local economy, including the cultivation of betel leaf and cashew nuts, fish farming, use of forest products, and so on. According to the corporate's plans, more than 20,000 people from eight villages in Dhinkia, Nuagaon and Gadkujang would have been displaced from the steel plant and port area alone, and about 50,000 people were going to be affected through environmental destruction, loss of livelihoods or otherwise. Iron ore for the steel production was going to be mined from the Khandadhar mountain area in the northern district of Sundergarh, roughly 400 kilometres north of the envisaged port. The mining activities would have largely occurred in an area predominantly inhabited by tribal communities, who depend on the forest and water bodies for a living.

The large-scale project was celebrated by politicians and business as India's largest foreign direct investment (FDI) to date, comprising a total investment of 12 billion USD. Accordingly, the state government tried its utmost to live up to its commitment in a Memorandum of Understanding (MoU), which it had signed with POSCO India back in April 2005. In the agreement, the state government pledged itself to identify, acquire and transfer a suitable tract of land, within a reasonable time frame, amounting to 50 square kilometres for the integrated steel plant alone, excluding plans for a captive port, water supply systems, new roads and an integrated township. When the MoU took effect in 2005, the state government did not

own a single acre of the fertile coastal area, which was mostly inhabited and cultivated by small farmers, forest dwellers and fisher people. Neither were local communities interested in selling their land. As the struggle intensified, street protests, sit-ins, public campaigns, lawsuits, official complaint letters and petitions by the People's Movement (including youngsters) were increasingly met with violent repression, criminalisation of protest, arbitrary arrests, demolition of houses and land, as well as fabricated criminal charges (ESCR-Net/IHRC 2013). At the same time, environmental clearance was bogged down in legal processes for years, national and international attention from media and civil society increased pressure on the company, and a novel amendment of the Mine and Minerals Development and Regulation Act in 2015 required POSCO to participate in an auction process in order to get its captive iron ore mine. Eventually, the Korean steel giant, one of the world's largest steel producers, decided to surrender the allotted land back to the state government in March 2017.

It is by no means an exaggeration to call this struggle anti-imperial. At least not, if we follow Rosa Luxemburg's suggestion that we understand imperialism as "the political expression of the process of the accumulation of capital in its competitive struggle over the unspoiled remainder of the non-capitalist world environment" (Luxemburg 2003: 426). Within three decades, POSCO's large-scale mining, steel plant and port project would have extracted 600 million tons of iron ore and 70 billion litres of freshwater per year, irretrievably altering both local ecosystems and existing modes of living and production. Whereas local communities would have to bear the brunt of this socially and environmentally destructive model of development, POSCO's annual profit was estimated at 1.5 billion USD annually for the next 30 years. The struggle over POSCO's plans in Odisha is a distinct but certainly not an isolated case. It is, however, exemplary for a vast number of socio-ecological conflicts throughout the world, mainly fought between private corporations backed by state power and adversely affected communities. Although each case has its own political, historical and cultural context, this paper argues that we need to understand the common ground of these struggles to make sense of their systemic relevance for global development.

Following Luxemburg's notion of imperialism, this article intends to outline a theoretical framework to understand contemporary socio-

ecological conflicts. The second section will briefly define these conflicts and summarise key insights from nearly 2,400 cases registered in the Environmental Justice Atlas (EJA). Based on this outline, section three introduces a re-reading of Marx's theory of primitive accumulation and Luxemburg's theory of imperialism to make sense of these conflicts. Subsequently, this re-reading is contextualised within broader trends of capitalist development. Schumpeter's famous notion of *Creative Destruction* will be complemented by introducing the concept of *Destructive Creation*. Finally, the article will discuss the implications of this conceptualisation, suggesting that socio-ecological struggles be perceived as both analytical and political entry points for debates on socio-ecological transformation.

2. Socio-ecological conflicts as global phenomena

Social conflicts with an inherently environmental dimension have increasingly captured the public in the form of notions of "blood diamonds", "climate wars" or the mismanagement of natural resources by third-world elites (Collier 2011; Le Billon 2012; Welzer 2012). Although intimately linked to these conflicts, the analytical focus of this paper is somewhat different. Whereas competition between nation-states is crucial to these approaches, the way socio-ecological struggles are defined here refers to conflicts between economic actors (either private or state-owned companies) and local communities. What lies at the heart of these conflicts is a struggle over economic activities that fundamentally change the social access to, use of, and control over, land, water bodies, forests and other natural resources. Despite occasional attention for individual cases, these struggles have rarely received academic or public notice as a *distinct type of struggle* that requires a common theoretical understanding.

In attempting to promote both attention for and research interest in these conflicts, academics and activists have developed the Environmental Justice Atlas (EJA). In April 2018, this global database listed 2,397 socio-ecological conflicts worldwide. It represents the largest open source data base on these conflicts to date. Besides attempting to make these struggles visible, the founders of the EJA sought to stimulate "deeper evidence-based enquiry into the politics, power relations and socio-metabolic processes

surrounding environmental justice struggles" (Temper et al. 2015: 257), beyond individual cases. As such, it builds fertile ground for the present attempt to develop a theoretical framework to understand the common nature of these conflicts.

Registered cases have to fulfil three criteria; first, these conflicts are socio-ecological because they revolve around economic activity or legislation with actual or potential negative environmental and social outcomes. These include consequences for livelihood opportunities, socio-cultural traditions and forms of knowledge, impacts on health, and environmental impacts such as loss of biodiversity or desertification. Second, a claim by a social group has to be advanced to the effect that such harm occurred or is likely to occur as a result of the disputed activity, and this social group has to be involved in mobilising against this. Third, one or more media stories reporting on this issue have to exist in order to provide witness to the above mentioned claims (Temper et al. 2015). The way conflicts are understood in this paper thus always incorporates both corporate claims on natural resources and resistance movements. The notion of conflict highlights the potentially violent dimension of the incompatibility of interests and related claims. This is all the more justified, when we realise that the vast majority of these conflicts (71 per cent) are characterised by street protests and visible mobilising or widespread mass mobilisation, including violence and arrests (see also Navas et al. 2018). Simultaneously referring to these conflicts as struggles emphasises the social class dimension. Several scholars have suggested that these "dispossession struggles" be understood as a distinct form of class struggle (Andreucci et al. 2017; Guha/Martinez-Alier 1997; Levien 2013), a notion which will be discussed later in the article.

The uneven geography of contemporary socio-ecological conflicts becomes visible at first sight. Three quarters of these struggles occur in Latin America, Africa and Asia. Considering the size and population of these continents, this may come as no surprise. However, the extraction of biomass and raw materials has rapidly increased with economic growth since the second half of the twentieth century (Krausmann et al. 2009). While consumption largely occurs in Europe and North America, production has shifted towards the South and East, increasing extractivist pressures and the potential for conflict in these regions (Schaffartzik et al. 2016). Although numerous socio-ecological conflicts occur throughout

Europe and in the United States, the hubs for these struggles are mainly found in Latin America (e.g. Colombia, Brazil, Peru, Mexico) as well in South and South East Asia (India, Philippines, Indonesia). In the ranking according to the number of incidences the top 15 countries comprise more than half (54 per cent) of all mapped conflicts, and they are also mainly former European colonies.

More than two-thirds (69 per cent) of these conflicts are fought over land acquisition, water use, control over raw materials (including fossil fuels) as well as large-scale infrastructure and related waste. Grievances almost invariably include issues of displacement and land dispossession, loss of livelihood opportunities, biodiversity and traditional knowledge and practices (see also Özkaynak et al. 2015). Moreover, violations of human rights, food crop damage, and ground water depletion or pollution occur in most cases. It is the communities that suffer from adverse environmental, health and socio-economic consequences of the disputed economic activities that are at the forefront of mobilisation. Almost invariably, farmers and fisher people, indigenous groups, traditional communities or racially discriminated groups are at the heart of social movements against corporate claims, while in many cases women's groups play a pivotal role. Mobilising groups frequently receive support from local and international civil society, including non-governmental organisations, local political parties, academics and trade unions. The actors behind the disputed economic activities are mostly transnational corporations (TNCs) which dominate their respective sectors. Mining, being one of the most contested sectors, is a case in point. The top five largest mining companies, namely Glencore Xtrata, BHP Billiton, Rio Tinto, Vale SA, and Anglo American, are involved in at least 111 contemporary struggles over land acquisition, air pollution or toxic waste throughout the globe. A similar picture emerges when looking at other sectors, such as energy, agriculture and food production (Shah 2016). Although this involvement might seem limited to industrial production, investigative reports suggest that contemporary financial institutions such as banks and insurance companies are increasingly involved in realising these "dirty profits" (FacingFinance 2018). Although these findings do allow for a general understanding of relevant actors, matters, and interests, the question remains open as to what role these struggles play in the context of capitalist development.

3. Capital and the battle of annihilation

In recent years, contributions from ecological economics and political ecology have significantly contributed to understanding the complex nature of these "ecological distribution conflicts" (Temper et al. 2018). Important aspects of these studies include aspirations and strategies of mobilising groups, as well as different languages of valuation and analysis of alternative society-nature relations (Martinez-Alier 2002; Martinez-Alier et al. 2010; Singh 2015; Swyngedouw 2015). More often than not the conflicting line in these struggles is not between ecology and economy or conservation and utilisation, but between "*different forms* of human utilisation of nature" (Brand et al. 2008, own emphasis). Several analyses show that local communities involved in mobilising value their land, forests, and water sources for reasons other than the purely economic, perhaps because they consider nature to be sacred and uncommodifiable (Escobar 2006; Gerber et al. 2009; Urkidi 2010). Put simply, "[s]ome values such as human life, health, nature, love, honor, justice, or human rights, are seen as absolute and inviolable and thus trading them off with other values (e.g. money) is considered taboo" (Temper/Martinez-Alier 2013: 85). In other words, these conflicts are not fought in economic terms, despite economic activity being at the centre of the dispute. Moreover, although these struggles mostly revolve around economic activities, a conceptual understanding of their systemic economic and extra-economic dynamics remains vague. In what follows, I will argue that these conflicts can be interpreted as value struggles that are essentially about different society-nature relations that clash due to capital's violent expansion into "the unspoiled remainder of the non-capitalist world environment" (Luxemburg 2003: 426). These value struggles are conceptualised from the perspective of capital's imperialist drive to expand, since it is corporate claims on people's living environments that trigger conflicts in the first place.

Before further exploring capital's imperial character, it is important to understand capital as a distinct *social form*. It is a relation that structures the (re)production of society while simultaneously mediating society's relation to non-human natures. As such it is a historically specific mode of production. Moreover, it is a peculiar form of commodity production and exchange, one that abstracts from a commodity's use value, and instead

privileges its exchange value. In other words, capitalist relations imply that land, forests or water bodies are not primarily used for the production of specific use values but for the accumulation of value in the form of money. As such capital is value-in-motion. Hence, Marx describes capital as a social relation in which money is perpetually sent in search for more money, a "restless never-ending process of profit-making" (Marx 1887: 127).

Its inherently social character becomes most obvious when looking at the explicit presuppositions of the capitalist mode of production, namely a class division between capital and labour that requires the latter to sell their *labour power* in the absence of control over sufficient *means of production*, in order to produce commodities. From this perspective we can also understand why capital can only fully be understood as a social relation, or, more specifically, as a class relation. Frequently, the capitalist mode of production and capitalism are simply equated and used interchangeably. This conflation is problematic both analytically and politically. In her famous treatise *The Accumulation of Capital*, Luxemburg consistently emphasises that "we cannot gain a true picture of it by assuming the exclusive and absolute domination of the capitalist mode of production" (Luxemburg 2003: 345). In other words, capital accumulation implies a "metabolism" between the capitalist economy and other modes of (re) production (Luxemburg 2003: 397). From this perspective, the capitalist mode of production is predominant but not exclusive in global capitalism, just like the class relation is a constitutive power relation of capital, but certainly not the only one. Ultimately, these multiplicities coalesce into a complex hegemonic order that evolves dynamically over time and in specific locations (Alnasseri 2004; Buckel 2015; Sanyal 2007). While accumulation proper via commodity production remains vital, Luxemburg innovated Marxian thinking by highlighting the dual character of capital accumulation. The latter includes the persistent need for cheap elements of constant capital, such as raw materials or fertile soil, in order to increase productivity, as well as the existence of non-capitalist outlets to realise the surplus value (Luxemburg 2003: 323ff.).

Complementary to accumulation proper, the expansion of the capitalist mode of production depends on what Marx referred to as so-called primitive accumulation, a process which creates the "fundamental conditions for capitalist production" (Marx 1887: 507). However, contrary to

Marx's conceptualisation of primitive accumulation as limited to a historical period that led to the rise of global capitalism, extra-economic moments remain key to sustained capitalist expansion, from the perspective of Rosa Luxemburg. These moments most importantly include (state) force, rule of law, and compulsion through economic laws (Luxemburg 2003: 351; Marx 1887: 526ff.). The pivotal importance of land acquisition and control over other natural resources in contemporary socio-ecological struggles reflects the mixture of these three moments very well. A recent meta-study of 95 socio-ecological conflicts in Central America has highlighted the multidimensional forms of violence which only become visible due to movements of resistance and opposing claims by mobilising groups (Navas et al. 2018).

However, these processes go beyond what Marx and Luxemburg described in their works. Ultimately, they are about the re-structuring of how societies and their relation to the environment are constituted and reproduced through and beyond the economic sphere. After all, socio-ecological struggles not only consist of claims like "the land is ours", but also often involve more fundamental questions regarding society-nature relations, such as "what are the trees for?" (Martinez-Alier 2003). In recent years, several feminist and ecological re-readings of Marx's so-called primitive accumulation have shown that this process also includes the gendered division of labour sustaining social reproduction (LeBaron 2010), the control over women's reproductive capacities (Federici 2004), processes such as "housewifization and colonization" (Mies 1986), and the appropriation of non-human natures (Görg 2004; Moore 2015), both historically and in the present period. In other words, capital's imperial expansion and appropriation of non-capitalist environments creates conditions for further capital accumulation beyond the explicit presuppositions of labour power and means of production. Most importantly, these implicit presuppositions include the mostly unpaid and invisible work in the sphere of social reproduction (Elson 1998; Federici 2012; Katz 2001; Mies 1986), and the appropriation of natural resources and use of ecosystem services as "nature's free gifts" (Guha/Martinez-Alier 1997) that sustain capital accumulation (Foster et al. 2011; Shiva 1993). Without these implicit presuppositions, capital cannot reproduce successfully. Ultimately, these presuppositions increase labour productivity because they are not (fully) valued, although necessary for accumulation. As feminist and environmentalist

studies have shown, invisible work and non-human natures influence the systematic determination of socially necessary labour-time, and thus labour productivitiy and the creation of surplus value in commodity production (Burkett 1996; Elson 2015). Nevertheless, in the process of capital's imperialist expansion they are made invisible at the level of valuation and are thus subsequently referred to as *invisible presuppositions*.[1]

While these enclosures clearly revolve around the re-structuring of people's material livelihoods, they also always comprise the altering of the immaterial sphere, including knowledge systems, cultural practices, and lived normalities (von Werlhof 2000). However, neither the material nor the immaterial sphere are 'given' per se. A consequent re-reading of the dual character of capital accumulation has to move from a substance-based view towards a relation-based perspective, in order to avoid the deterministic impetus embodied in Luxemburg's writings. In other words, spaces that are commodified and invisible presuppositions that are appropriated are not simply given substances. Rather, they are produced through social relations, most importantly (scientific and public) discourse, which constantly shifts the lines between the "colonised and colonisable" (De Angelis 2006). Since most of the disputed projects are labelled as "development projects", it is primarily the development discourses that produce such suitable terrains (Nixon 2011; Sanyal 2007). It is neither a coincidence that the above mentioned case of POSCO India was hailed as a major development project, attracting more foreign direct investment than any other project before, nor that the influence of public discourse through visible mobilisation, litigation, national and international attention, and solidarity has significantly contributed to halting the company's ambitions.

For Luxemburg, the essence of imperialism under capitalist relations is fundamentally different from other historical forms of empire: "All conquerors pursued the aim of dominating and exploiting the country, but none was interested in robbing the people of their productive forces and in destroying their social organisation" (Luxemburg 2003: 352). The specificity of capitalist imperialism thus lies in its ability to re-structure social and society-nature relations according to its own needs. Yet this process is neither a functional necessity, nor is it always successful. It is an ambition by certain social groups and related class interests which is always also opposed by other social forces which actively (re)produce an

outside to capital (De Angelis 2006; Nixon 2001; Sanyal 2007). In other words, socio-ecological conflicts are expressions of hegemonic struggles between different existing social and society-nature relations (Raza 2003: 163). Although radically different in their use of symbols and language or ways of mobilising, these conflicts challenge the appropriation of their living environment through the process of capitalist valorisation (*Inwertsetzung*). In this context, the notion of struggle is crucial. After all, the re-structuring of social and society-nature relations that lies at the heart of imperialism is a "battle of annihilation" (Luxemburg 2003: 349). When looking at the increasing number of environmental activists that are being killed in contemporary socio-ecological struggles, the image of "battle" becomes more than just a metaphor: last year, almost 200 environmentalists were murdered, four times more than those recorded in 2002 (Watts 2018).[2]

4. Destructive creation

Understanding Luxemburg's "battle of annihilation" from an ecofeminist perspective requires us to shift our attention from the mere focus on the horizontal struggle between capitalist and non-capitalist modes of production to include the corresponding vertical appropriation of unpaid labour as well as that of free energy (see Figure 1). After all, the horizontal de-integration of other modes of production (e.g. subsistence economy) is directly linked to the re-structuring of conditions for the vertical appropriation of capital's *invisible presuppositions*. While economic exploitation in commodity production is based on the formal exchange of equivalents, unpaid work and non-human natures are appropriated by extra-economic means without exchange for equivalents. Only from the perspective of capital's *invisible presuppositions* can we fully understand its contradictory reproduction through expansion. As Rosa Luxemburg put it, these struggles "extend over values as well as over material conditions for constant capital, variable capital and surplus value alike. […]" (Luxemburg 2003: 345). Although surplus value arises out of the capital-labour relation, it is not exclusively determined by it. Recent studies on the history of capitalist development have emphasised that labour productivity has always

been co-determined by the appropriation of de-valued work and "cheap natures" which are often formally outside the zone of commodity production (Beckert 2015; Malm 2016; Moore 2015). Socio-ecological struggles are thus not only struggles over the distribution of environmental benefits and burdens (Temper et al. 2018), but always also struggles over economic value appropriation and distribution that "unfold in relation to the capital–labor axis, but occur outside of the relation of [commodity] production" (Andreucci et al. 2017: 39). Put differently, socio-ecological struggles are a distinct type of class struggle that co-produce the trajectory of capitalist development. In order to highlight this point, I would like to build on Schumpeter's famous notion of Creative Destruction.

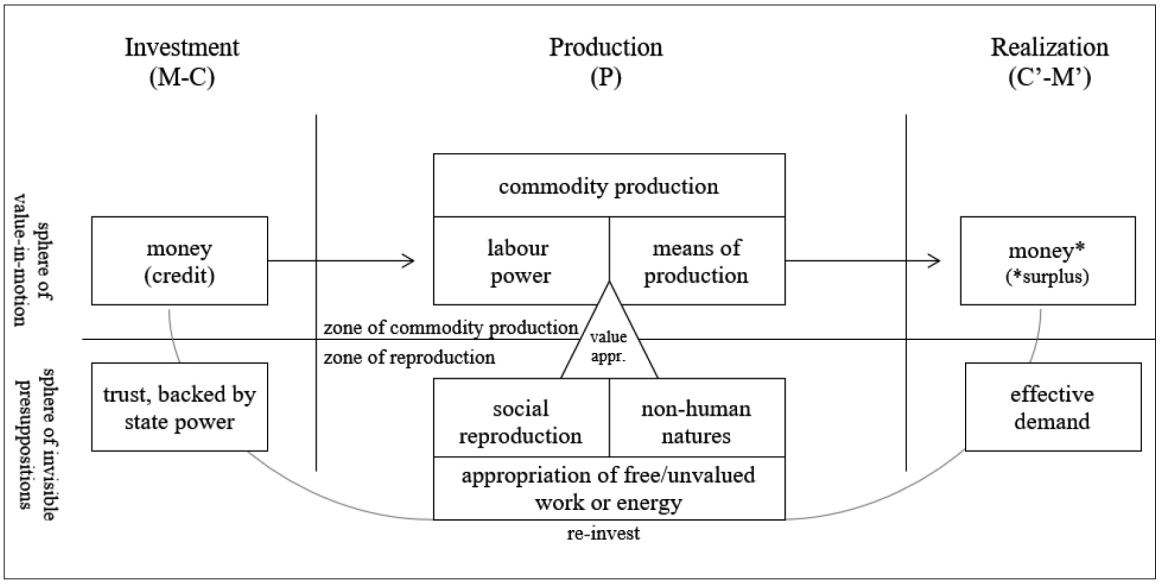

Figure 1: Abstract Capitalist Circuit and Invisible Presuppositions
Source: own illustration; inspiration from Marx (1887); Mies (1986); Moore (2015)

Contrary to many economists in the early 20th Century, Schumpeter argued that capitalism's fundamental dynamic is evolutionary and thus cannot be captured in an automatic increase of population or money. Instead, it arises from new objects of consumption, new markets, and new forms of industrial organisation created by capitalist corporations (Schumpeter 1950: 137). It is these innovative processes that "inces-

santly revolutionize[s] the economic structure from within, incessantly destroying the old one, incessantly creating a new one. This process of Creative Destruction is the essential fact about capitalism" (Schumpeter 1950: 137f.). Although certainly not a Marxian scholar, Schumpeter essentially elaborates on what Karl Marx and Friedrich Engels describe as the bourgeoisie's drive to "constantly revolutionise the instruments of production" (Marx/Engels 1969: 16) in a famous passage of the *Communist Manifesto*, or what Rosa Luxemburg labelled as "incessant revolutions in the methods of production" in *The Accumulation of Capital* (Luxemburg 2003: 324). What makes the notion of Creative Destruction so appealing for critical scholars is that it places emphasis on the relational dynamics of economic activities and not on their properties. Accordingly, capitalism does not simply work within a given social structure, but rather creates and destroys its own environment at the same time (Schumpeter 1950: 139). As was emphasised before, capital is a relation and we can only understand it as a process in-the-making. Moreover, it is not merely an economic process, but a social relation that structures social and society-nature relations. The incessant revolutionising of the capitalist mode of production is thus also linked to a constant change in the structuring of society-nature relations.

What becomes obvious is that such a notion of capitalist development exclusively privileges the visible sphere of value-in-motion. This is not to deny innovations in terms of technology or organisation as the most successful instances of value generation. The ongoing digitalisation of the global economy is an impressive example of the destruction of old business models and sectors, and the rise of others, including the fundamental re-structuring of labour (Huws 2014). However, the question is whether these "incessant revolutions" in the zone of commodity production are the only answer to the secret of capitalist development. Of the hundreds of millions of computers, smartphones and cars that are produced and consumed every year, none could exist without a constant influx of raw materials. The creation of cheap raw materials through the destruction of people's livelihood opportunities is part of more efficient commodity production on a global scale. What appears as destruction to the affected communities is profitable investment for capitalist corporations, and cheap deals for the global consumer class. This nexus is what Ulrich Brand and Markus Wissen have referred to as the *imperial mode of living* (Brand/Wissen 2013).

From this perspective the difference between economic revolutions in commodity production, i.e. through innovative technologies and organisation, and extra-economic dimensions related to the commodification of non-capitalist spheres and the appropriation of free or de-valued work and non-human natures, becomes clear. In addition to the industrial revolutions characterising new phases of capitalist development, there is a distinct set of destructive and creative processes related to the sphere of *invisible presuppositions*. In adopting the concept of Creative Destruction, I suggest conceptualising this family of processes as a form of 'Destructive Creation'. Contrary to the disintegration of old business models and consumption patterns, destruction here is not synonymous with elimination. Rather, destruction describes the articulation between capitalist and non-capitalist modes of (re)production, where the latter are fundamentally altered and subsumed under the hegemony of the former (Alnasseri 2004: 86). What is destroyed are other modes of living and (re)producing communities which are not primarily based on profitable commodity production in the market, or, as Michael Perelmann put it, "the destruction of their way of life" (Perelman 2007: 49). This not only includes forms of material dispossession or displacement, most visible in the thousands of socio-ecological conflicts, but also the fragmentation of communities and the destruction of local knowledge systems (De Angelis 2006; Shiva 1993; von Werlhof 2000). Put more poetically, it is the "annihilation of those who have a different imagination" (Roy 2010). Moreover, creation refers to new opportunities for capital to reproduce itself by appropriating unpaid work and energy. As discussed earlier, appropriation strategies do not simply refer to something existing out there, but rather involve complex processes of meaning-making, or the discursive production of suitable outlets for profitable investment and appropriation. Logically, such discursive production has to be materially realized in order to be subsumed under the global circulation of capital.

The notion of Destructive Creation helps to demonstrate the transformative and conflictual nature of development projects at the level of *social forms* that organise the reproduction of communities. In doing so, it grasps the global and simultaneously local character of these conflicts. Complementary to the (mostly economically) innovative process of Creative Destruction that places emphasis on the ingenuity of new entrepre-

neurs, the notion of Destructive Creation highlights the mostly violent and coercive dimensions of the (largely extra-economic) global re-structuring of social and society-nature relations that creates the necessary conditions for successful capital accumulation on an expanded scale. As Rosa Luxemburg emphasised, "[o]nly the continuous and progressive disintegration of non-capitalist organisations makes accumulation of capital possible" (Luxemburg 2003: 397). Capitalist development is therefore best understood as the "audacious mixture of productivity and plunder" (Moore 2010c: 46), or as the unified process of Creative Destruction and Destructive Creation. While some strategies of expanded reproduction aim at deepening existing exploitative relations (creative destruction/accumulation proper), others aim at appropriating and restructuring new spaces and thus new social and society-nature relations in order to subordinate them to the circulation of capital (destructive creation/primitive accumulation).

5. Socio-ecological conflicts and dynamic limits to capital

Understanding the restructuring of social and society-nature relations as Destructive Creation gives us a more accurate idea of how capitalist development advances. The global economy is thus not only made up of global value chains in the sphere of value-in-motion. In a similar fashion, it is constituted of commodity frontiers (e.g. for raw materials or cultivable land) which trace back capitalist expansion and simultaneously show the often violent nature and unevenness of this process (Moore 2000: 411). Such capitalist development, as outlined above, is premised on both the commodification of uncommodified spaces and on the appropriation of services that keep commodity production profitable (Moore 2015: 63). For the "restless never-ending process of profit-making" (Marx 1887: 127), these frontiers create windfall profits, both visible and invisible. As such, socio-ecological struggles are also frontier-making movements. One the one hand, the notion of the frontier represents a spatial boundary between two distinct spheres, namely capitalist and non-capitalist relations of (re) production. On the other hand, it also signifies a certain (though dynamic) limit to the expansive drive of capital.

In writing *The Accumulation of Capital*, Rosa Luxemburg was motivated in to analyse a question neither Marx nor his followers had systematically touched upon - the future economic limits of capital. Building on Marx's mathematical reproduction schemes from *Capital Volume II*, Luxemburg was particularly struck by the question of who realised the permanently increasing surplus value, if neither capitalists nor the working class were able to do so. Today, most historical materialist scholars agree that there are numerous analytical flaws in Luxemburg's underconsumption theory, while some of her basic intentions remain pertinent to this day (for an overview see Albo 2016). Following the notion of Destructive Creation, the question of limits to capital can be thought differently. Instead of focussing on the realisation of surplus value in the visible sphere of value-in-motion, our attention shifts towards capital's challenge of constantly assembling sufficient *invisible presuppositions* to safeguard the expanded reproduction of capital. Accordingly, destruction and creation are part of a dialectic movement that occurs both in the visible zone of commodity production and at the border of the zone of reproduction. As such, destruction and creation characterise the evolution of a socio-ecological relation of (re)production (not merely a substance). Raw materials, fertile soil or other natural resources may get partly depleted by excessive global consumption and the drive for further economic growth, and as such may create geographically specific limits to further appropriation. However, the present climate crisis shows that depletion of resources is also a vast opportunity for Creative Destruction, e.g. new markets, new investment streams, and new business models, such as carbon markets (Lohmann 2012). Limits to capital are thus not definite and external but spatio-temporarily specific[3], so that limits at one point in history may not be perceived as limits at another. In other words, the valorisation process characterises the immanent limits of the capitalist mode of production while simultaneously being the source of its creative and destructive force vis-à-vis human beings and nature (Brand/Wissen 2013: 692; Parenti 2015: 833). The outlined theoretical framework allows us to see socio-ecological struggles as crucial struggles in the process of valorisation, albeit different from labour struggles in the zone of commodity production. From the perspective of Destructive Creation, socio-ecological conflicts are thus disruptive forces against capital's imperialist quest to valorise ever more

territories. By contesting capital's violent expansion, these struggles politicise development projects and make the frontiers of imperialism visible in specific locations.

Even more importantly, they may create limits to capital. About one in six of the more than 2,000 cases in the EJA has been successful in halting the progress of socially and environmentally destructive projects (Scheidel et al. 2017). Consequently, mobilising groups also disrupt geographically specific ambitions of valorisation for a certain time. Given the size and scope of many of these investments, often including the building of large-scale infrastructure, such barriers may influence capital accumulation on a broader scale. Yet these limits are always only temporary and never without sacrifices, as the opening example of POSCO in India shows. The firm resistance of local communities and their regional and international support networks managed to stall India's largest FDI by one of the world's largest steel producers, halting their attempts to valorise their living environment. The "battle of annihilation" was won after almost 12 years of resistance but the victory was pyrrhic, as several observers commented. It left the communities with over 2,000 warrants for arrest, 400 police cases, lives lost, livelihoods disrupted, communities fractured, and the constant memory of violence and repression (Padhi/Patana 2017). Furthermore, understanding capitalist development as a process that is always in motion implies another dynamic, namely that any such attempt is likely to occur again, either in the same area or elsewhere. Shortly after POSCO's withdrawal from its investment in Jagatsinghpur district, the Indian conglomerate JSW Group requested more than 18 square kilometres of the project land granted to POSCO from the state government of Odisha in June 2017. The company is currently involved in at least four other socio-ecological conflicts in India. How these ambitions materialise and what form local resistance will take remains to be seen. What can be concluded, however, is that limits to capital, actively produced by contemporary socio-ecological struggles, can only ever be temporary limits. In this sense, these conflicts can be understood as dynamic limits to capital.

Theorising contemporary socio-ecological struggles in the context of capitalist development is not only a theoretical exercise. In the context of progressing climate change, a more nuanced understanding of and broader

attention to these struggles are pertinent for emerging debates on global transitions towards sustainable forms of (re)production (Brand et al. 2013; Haberl et al. 2011; Scheidel et al. 2017). This is neither to idealise these conflicts nor to ignore their differences and potentially conflictual interests. Rather, it is to argue that once we acknowledge these conflicts as a specific type of (class) struggle inherently linked to contemporary capitalist development, these conflicts become entry points for repelling exclusive, exploitative and divisive social and society-nature relations, and for creating, strengthening and protecting alternative modes of (re)production. Clearly, such an analysis cannot arbitrarily re-define these highly defensive struggles as offensive ones. However, it may trigger debate on new alliances and novel forms of solidarity, if contemporary socio-ecological conflicts are envisaged as part of a transnational challenge to global capitalism.

1 In order to highlight the strategic dimension of capital's value regime, Jason Moore has referred to work, food, energy, and raw materials as "cheap natures" (Moore 2015). Recently, Patel/Moore (2017) have added money, care and lives to the list. For the purpose of this article, however, the notion of cheap natures blurs the line between capitalist and non-capitalist spheres too much. Since this distinction is crucial to make capital's expansion visible while at the same time highlighting capital's dependence on these dimensions, the concept of i*nvisible presuppositions* is used.

2 The crucial role of multiple forms of violence in these struggles is also emphasised by scholars from the field of ecological economics (Navas et al. 2018). For a more specific analysis, one has to include the terrain on which these struggles are fought, that is the 'integral state'. Due to limited space, this point cannot be elaborated further here. For a more detailed description, see (Shah 2016: 51ff.).

3 This is not to say that theoretically there are no definite ecological limits to human production. Instead, it highlights the fact that, historically, the perceived limits and strategies to circumvent them through geographic shifts of various commodity frontiers have been far more flexible than commonly suggested (Moore 2010b; Moore 2010a).

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Abstract *Dieser Artikel entwirft einen theoretischen Rahmen, um gegenwärtige sozial-ökologische Konflikte im Kontext kapitalistischer Entwicklung zu verstehen. Durch die Zusammenfassung von knapp 2.400 Fällen aus dem Environmental Justice Atlas (EJA) werden zentrale Charakteristika dieser Kämpfe vorgestellt. Es wird vorgeschlagen, diese als Klassenkämpfe einer anderen Form zu begreifen. Während traditionelle Klassenkämpfe auf das Verhältnis von Kapital und Arbeit in der sichtbaren Zone der Warenproduktion fokussieren, werden sozialökologische Konflikte durch eine Reinterpretation von Rosa Luxemburgs Imperialismustheorie als Kämpfe um Inwertsetzung (value struggles) zwischen kapitalistischen und nichtkapitalistischen (Re-)Produktionsweisen analysiert. Die Konsequenzen für kapitalistische Entwicklung werden durch die Umkehrung von Joseph Schumpeters bekanntem Konzept der kreativen Zerstörung in eines der zerstörerischen Schaffung betont. Als grenzziehende Entwicklungen werden diese Konflikte als dynamische Grenze des Kapitals konzeptionalisiert und bilden somit ein wichtiges Terrain für sozialökologische Transformation.*

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Pluriversale Verschränkungen kosmozentrischer und egozentrischer Ontologien der *maseualmej* im mexikanischen Cuetzalan

Abstract *Der Beitrag fasst Weiterentwicklungen von Rosa Luxemburgs Analyse des Kapitalismus als System, das auf der fortgesetzten Ausbeutung nicht kapitalistisch wirtschaftender Bereiche beruht, zusammen. Diese Theorien bleiben jedoch der im kapitalistischen System vorherrschenden naturalistischen Ontologie verhaftet. Ein Aufbrechen dieser Ontologie, und damit eine Dekolonisierung des Denkens und Seins bedürfen der wertschätzenden Anerkennung anderer Ontologien und ihrer dialogischen Verschränkung (Pluriversalität) sowie entsprechenden Handelns. Diese dialogische Verschränkung ist allerdings nicht nur eine Angelegenheit von dekolonial orientierten Wissenschafter_innen. Der Beitrag zeigt, wie sich die von Prozessen fortgesetzter ursprünglicher Akkumulation betroffene indigene Bevölkerung, die maseualmej des mexikanischen Bezirks Cuetzalan del Progreso, über eine solch pluriversale Verschränkung unterschiedlicher Ontologien ihrer endgültigen Kolonisierung entzieht.*

Keywords *Fortgesetzte ursprüngliche Akkumulation, Ontological Turn, Dekolonisierung, Indigene Cuetzalans (Mexiko), Pluriversalität*

„[I]f othering involves attributing to the objectified other a difference that reinforces the primacy of the self, saming denies the objectified other the right to her difference and subjects her to the laws of the self. […]
[O]ntology is an attempt to take others and their real difference seriously" (Blaser 2014: 52).

1. Einleitung

Mario Blaser spricht in seinem Beitrag „Ontology and Indigeneity" (2014) ein wichtiges Thema an, das die folgenden Ausführungen begleitet: die Missachtung anderer, „nichtwestlicher" Ontologien (d.h. Kosmologien, Zugangsweisen zu Prozessen des Seins, zu Realitäten oder Welten). Diese eurozentrische Haltung ist sowohl Mittel als auch Ergebnis von Enteignungsprozessen, die seit mehreren Jahrhunderten stattfinden und in enger Verbindung mit kolonial-kapitalistischer Ausbeutung stehen. Sie durchzieht aber auch die lange Tradition europäischer Kritik an diesen Verhältnissen.

In Debatten um Kolonialismus und Kapitalismus dominieren lange Zeit aufklärerisch-westliche Zugänge mit Fokus auf ökonomische Aspekte. Karl Marx (1981: 659ff) bezieht sich in seiner Darstellung der „ursprünglichen Akkumulation" primär auf die Enteignung von Menschen von ihrem Land als ihrem wesentlichen Produktionsmittel, als Basis für ihre Eingliederung in den kapitalistischen Arbeitsmarkt. Rosa Luxemburg (1985) hebt zu Beginn des 20. Jahrhunderts hervor, dass gewalttätige Enteignungen zu Zwecken der Kapitalakkumulation keine Kinderkrankheit, sondern ein Wesensmerkmal des Kapitalismus sind und entwickelt Marx' Analyse zur These einer „fortgesetzte[n] ursprünglichen Akkumulation" (Werlhof 1978: 21) weiter. Demnach ist der Kapitalismus für sein Bestehen auf nichtkapitalistische Bereiche – Gesellschaftsschichten, Weltregionen etc. – angewiesen. In der Bielefelder Subsistenztheorie wird diese Überlegung aufgegriffen und hervorgehoben, dass Kleinbauern_bäuerinnen einerseits Subsistenzwirtschaft betreiben, andererseits aber gezwungen sind, ihre Arbeitskraft im kapitalistischen Sektor zu vermarkten und somit dem Kapital einen (für die Kapitalakkumulation notwendigen) Extraprofit bescheren (Arbeitsgruppe Bielefelder Entwicklungssoziologen 1979). Die

Feministinnen der Gruppe ergänzen, dass in ähnlicher Weise auch Hausfrauen als in das kapitalistische System teilintegrierte Gruppe zu sehen sind (Werlhof 1978; Mies 2009; vgl. Zuckerhut 2017a).

In die dekoloniale Theorie fließen diese Überlegungen ebenfalls ein. Allerdings wird hier vor allem der Zusammenhang „Dritte Welt" und „Erste Welt" (heute umbenannt in „Globaler Süden" und „Globaler Norden") bzw. Moderne und „Kolonialität der Macht" (Quijano 2000) herausgestrichen und – im Unterschied zum Bielefelder Ansatz – aus der Position der „Anderen", derer aus dem Globalen Süden, der Unterdrückten und Marginalisierten, heraus argumentiert (vgl. u.a. Quijano 2000; Maldonado-Torres 2016). Mitgeprägt ist diese Positionierung als Kolonisierte durch postkoloniale Strömungen, die den eurozentrischen Blick und das Othering (d.h. die Zuschreibung homogener, sich von der „westlichen Zivilisation" grundlegend unterscheidender Eigenschaften an alles „Nichteuropäische") in den vorherrschenden Wissenschaften wie auch den politischen Theorien kritisieren (Fink/Leinius 2014). Damit zeigt sich zunehmend die Bedeutung eines „Ontological Turn" (einer Wende hin zum Ontologischen), wie von Blaser (2014: 52) angesprochen, betreffend das Aufgreifen und Anerkennen nicht hegemonialer, meist indigener Ontologien (also über die Erkenntnis hinausgehend, auf das Sein Bezug nehmend) (vgl. auch Kohn 2015). Im Zuge dieser Wende geraten auch die ontologischen Dimensionen fortgesetzter ursprünglicher Akkumulation in den Blick. Demnach gehen kapitalistische Expansionsprozesse mit einer Expansion westlicher Seinsverständnisse sowie der Marginalisierung anderer Ontologien einher.

Die dekoloniale Bedeutung indigener Ontologien zeigt sich beispielsweise, wenn die indigenen nahuat-sprachigen Einwohner_innen des mexikanischen Bezirks Cuetzalan del Progreso (Selbstbezeichnung *maseualmej* [Pl.] und *maseual* [Sg.]) sich den vielfältigen Prozessen der Akkumulation durch Enteignung, denen sie seit der Conquista ausgesetzt sind, widersetzen. Eine zentrale Rolle spielt dabei eine kosmozentrische Ontologie, die jedoch nicht absolut gesetzt, sondern mit der westlich-kapitalistischen kombiniert wird. Je nach Kontext wird auf die eine oder die andere Ontologie zurückgegriffen. Pluriversalität als gleichwertig-dialogische Anerkennung verschiedener Seinssysteme ist alltäglich gelebte Praxis und erfolgreiche Überlebensstrategie (Zuckerhut 2017b).

Der vorliegende Beitrag geht der Frage nach der diesbezüglichen Relevanz pluriversal verschränkter Ontologien nach. Zunächst gebe ich einen Überblick der genannten Weiterentwicklungen von Luxemburgs Analyse des Kapitalismus als System, das auf Ausbeutung, Raub und Plünderung nichtkapitalistisch wirtschaftender Bereiche beruht. Der zweite Teil widmet sich kapitalistisch motivierten Enteignungsprozessen im mexikanischen, weitgehend von *maseualmej* bewohnten Bezirk Cuetzalan del Progreso, ebenso wie der einhergehenden Pluriversalität als einem wirksamen Mittel, ihrer vollständigen Vereinnahmung und damit endgültigen Kolonisierung zu widerstehen. In diesem zweiten Teil wird auf die Bedeutung kosmozentrischer Ontologie für das Verständnis indigener (Über-) Lebensweisen eingegangen und ihre Verschränkung mit einer egozentrischen Ontologie aufgezeigt.

2. Fortgesetzte ursprüngliche Akkumulation als Wesensmerkmal des kapitalistischen Weltsystems

Luxemburgs andauernde Aktualität liegt in ihrem Konzept der fortgesetzten ursprünglichen Akkumulation als Anknüpfungspunkt, um die im Zusammenhang mit dem Kapitalismus stattfindenden vielfältigen Prozesse der gewaltsamen Enteignung zu Zwecken der Kapitalakkumulation begrifflich zu fassen. Wird von Marx (1981: 659ff) nahegelegt, dass die Vertreibungen und Enteignungen von Bauern_Bäuerinnen von ihrem Grund und Boden („Einhegungen“) und anderen Mitteln zur Produktion ihrer Subsistenz ein einmaliger Prozess in der Entwicklung des Kapitalismus sind (vgl. u.a. Meillassoux 1978: 3f), so ist Luxemburg (1985) davon überzeugt, dass koloniale und andere Arten von Gewalt, Raub und Plünderung sein immanentes Merkmal sind. Die zentrale Thematik gewaltsamer Enteignung wie auch die Möglichkeit einer verschränkten Koexistenz kapitalistischer und nichtkapitalistischer Produktionsweisen als Teil ein- und desselben kapitalistischen Systems steht in Folge, insbesondere seit den 1960er Jahren, immer wieder im Mittelpunkt vieler Analysen und Darstellungen (Sanyal 2007: 7; Soiland 2016: 189).

In der Kultur- und Sozialanthropologie der 1970er Jahre sticht diesbezüglich Claude Meillassoux’ (1978) Konzept einer „häuslichen Produk-

tionsweise“ (d.h. einer kleinbäuerlichen, auf die Subsistenz fokussierenden Produktions- und Konsumgemeinschaft) in ihrer Verflechtung mit und Ausbeutung durch das kapitalistische System hervor. Die Eingliederung in die kapitalistische Wirtschaftsweise zeigt sich laut Meillassoux vor allem in der Überführung von Arbeitskraft. Diese erfolgt sowohl über Landflucht als auch über die Organisation von Rotationswanderungen (ebd.: 125). In der temporären Migration, die seit dem Zweiten Weltkrieg an Bedeutung gewann, sieht er eine „perfektioniertere Form der ursprünglichen Akkumulation“ (ebd.: 128). Die kapitalistische Integration erfolgt nicht durch die Vernichtung, sondern die „*Aufrechterhaltung* und Ausbeutung der häuslichen Agrarwirtschaft“ (ebd.; Hervorhebung im Original). Die Reproduktion der in der kapitalistischen Produktion tätigen Arbeitskraft findet weitestgehend in der Hausgemeinschaft statt und ist damit in einen „nichtkapitalistischen“ Bereich ausgelagert. Somit ist es dem_der Unternehmer_in möglich, Lohnkosten zu sparen (ebd.: 138).

Kleinbäuerliche Subsistenzwirtschaft wird auch von anderen Forscher_innen, wie denen der „Arbeitsgruppe Bielefelder Entwicklungssoziologen“ (1979) (die Selbstbezeichnung ist männlich konnotiert, obwohl der Zusammenschluss mehrheitlich weibliche Mitglieder inkludiert, was typisch für die damalige Zeit ist), als einerseits besonders hartnäckig fortbestehend erkannt, andererseits in ihrer Verschränkung mit kapitalistischen Sektoren als besonders ausbeutbar. Subsistenzproduktion ermögliche es den Menschen in Krisenzeiten der Weltwirtschaft zu überleben, trage aber, ähnlich wie die Hausarbeit, gleichzeitig zur Senkung des Preisniveaus von Agrarprodukten und somit der Reproduktionskosten der Arbeitskraft bei (Arbeitsgruppe Bielefelder Entwicklungssoziologen 1979; Mies 2009). Sowohl die Arbeit von Kleinbauern_bäuerinnen des Globalen Südens als auch die der Hausfrauen des Globalen Nordens fließen in die (Wieder-)Herstellung aktueller und künftiger Produzent_innen ein (vgl. u.a. Werlhof 1978; Mies 2009).

Seit Anfang der 1970er Jahre wird Luxemburgs Überlegung einer „fortgesetzten ursprünglichen Akkumulation“ als Grundlage des kapitalistischen Systems folglich einerseits für die Analyse ausbeuterischer Macht- und Ungleichheitsverhältnisse zwischen Globalem Norden und Globalem Süden herangezogen, anderseits – damit verknüpft – für die Analyse kapitalistisch und nichtkapitalistisch wirtschaftender Produktionsein-

heiten zwischen sowie innerhalb von Nationen und Regionen, und sie wird darüber hinaus mit Geschlechterverhältnissen in Beziehung gesetzt. In Folge zeigen Kritiker_innen des kapitalistischen (Welt-)Systems (z.B. Frank 1980) die Strukturen des ungleichen Tauschs zwischen Globalem Norden und Globalem Süden auf. Eng damit verbunden ist eine intensive Debatte um die Problematik eines „internen Kolonialismus" (González Casanova 1965) in seiner Bedeutung für die Kapitalakkumulation. Diese bezieht sich auf die Ethnisierung sozialer und ökonomischer Hierarchien in (post-)kolonialen Gesellschaften. Demnach werde die Akkumulation nicht zuletzt durch die Überausbeutung marginalisierter und ethnisch diskriminierter Gruppen gestützt, die die Rolle innerer Kolonien spielten (Rodríguez Dominguez 2018: 87f). Dependenz-, Weltsystem- und dekoloniale Theorie verweisen auf die Bedeutung Lateinamerikas als Grundlage für die Herausbildung des kapitalistischen Weltsystems, dessen Ausplünderung die nachfolgende Akkumulation erst ermöglichte (vgl. u.a. Wallerstein 1979: 36f; Frank 1980: 33f; Quijano 2000). Die Geschichte Lateinamerikas, von seiner Erfindung im Zuge der „Entdeckung" des Kontinents durch Europäer_innen (der Bevölkerung vor Ort war seine Existenz schon seit Jahrtausenden bekannt, wenngleich unter anderen Bezeichnungen und mit völlig anderen Eigenschaften) (Mignolo 2005) bis heute, ist eine der „fortgesetzten ursprünglichen Akkumulation" (Cabrera Pacheco 2017: 506).

Die fortgesetzte ursprüngliche Akkumulation erweist sich in Folge als eine, die Land, Menschen, Körper (Federici 2012; Lugones 2007; Walsh 2015) wie auch Wissen und Wissenssysteme (Epistemologien) (Grosfoguel 2013) bis hin zu Ontologien (Seely 2017) betrifft (wobei Epistemologien – auf Wissen und Erkenntnis abzielend – und Ontologien – auf das Seiende bezogen und immer auch das Handeln der Menschen implizierend – in der Regel zwar eng miteinander verknüpft, aber dennoch nicht als identisch zu sehen sind; siehe Kapitel 3.2). Wissensformen, die der westlichen naturalistischen Ontologie (siehe Kapitel 3.2) widersprechen, werden im Zuge der kapitalistischen Expansion als falsch und gefährlich gebrandmarkt und häufig zerstört. Dies betrifft etwa Kosmologien, die die Zusammenhänge von Mensch und Umwelt bzw. Mensch und Kosmos in den Blick nehmen und in der Regel mit metaphysischen Vorstellungen und rituell-religiösen Praktiken verknüpft sind. Jene Menschen (wie Heiler_innen und Schaman_innen, in Europa insbesondere auch Hebammen), die über

diese Kenntnisse verfügen, werden verfolgt und getötet. Zugleich werden immer wieder Teilaspekte jenes Wissens aus ihren kosmologisch-ontologischen Zusammenhängen gelöst und für die kapitalistische Verwertung angeeignet. Dies betrifft etwa Kenntnisse aus dem Bereich der Pflanzenheilkunde, die sich naturwissenschaftlich bestätigen lassen und in der Folge von Pharmakonzernen patentiert und verwertet werden (vgl. u.a. Smith 2012: 122ff).

Voraussetzung für die unablässige Fortdauer der Enteignungsprozesse ist dabei, dass nichtkapitalistische Bereiche und Lebensweisen nicht endgültig aufgelöst und zerstört, sondern, zumindest teilweise, erhalten, in gewissen Aspekten gefördert und neu geschaffen werden (Sanyal 2007: 7; Zuckerhut 2016: 58).

Auf der anderen Seite bewirkte und bewirkt die fortgesetzte ursprüngliche Akkumulation immer auch Widerstand und Gegenbewegungen, oft vorangetrieben und gestützt durch fortbestehende nichtkapitalistische Bereiche und Lebensweisen, die insbesondere dann erfolgreich sind, wenn sie sich auf nichtnaturalistische Ontologien stützen können (vgl. dazu u.a. Walsh 2015; Cabrera Pacheco 2017: 508).

3. Prozesse der Enteignung und des Widerstands der *maseualmej* Cuetzalans

Mit einer Möglichkeit, sich der Kolonialität der Macht zumindest teilweise zu entziehen, befasst sich der folgende Abschnitt, mit Augenmerk auf die *maseualmej* der Gemeinde San Miguel Tzinacapan des mexikanischen Bezirks Cuetzalan del Progreso im Bundesstaat Puebla.

Von den 48.000 Einwohner_innen Cuetzalans bezeichneten sich bei der Volksbefragung 2015[1] 80 Prozent als indigen, zum einen als Nahuat (ca. 70 Prozent der Gesamtbevölkerung Cuetzalans) zum anderen als Totonaca-Sprecher_innen (ca. 10 Prozent) (INEGI 2016: 2/4 Tab. 3.2; Zuckerhut 2016: 126). Die Bezirkshauptstadt San Francisco Cuetzalan ist überwiegend von Nichtindigenen (im Folgenden auch mit dem von Indigenen verwendeten Begriff *coyomej* [Sg. *coyot*] – übersetzt „Koyot_innen"– bezeichnet) bewohnt, während die *maseualmej* größtenteils in den umliegenden Gemeinden, Dörfern und Weilern, zusammengefasst

in acht Verwaltungseinheiten, siedeln (Martínez Corona 2003: 229). San Miguel Tzinacapan, mit über 2.600 Einwohner_innen, ist eine dieser Gemeinden.

3.1 Datengrundlage und Auswertung

Die den Ausführungen zugrunde liegenden Daten beruhen auf unterschiedlichen Quellen: erstens historischen Dokumenten sowie Oraltraditionen der Region, die von Forscher_innen in Kooperation mit *maseualmej* aufgearbeitet und publiziert wurden (z.B. Ramírez Suárez et al. 1992; Argueta 1994; Beaucage, Pierre/Taller de Tradición Oral del CEPEC 1997, 2012); zweitens Ethnografien (z.B. Arizpe 1973; Lupo 1995, 2001) und anderen wissenschaftlichen Arbeiten (z.B. Thomson 1991, 2002; Mallon 1995; Báez 2004; Bernkopfová 2014), drittens Internetdokumenten und viertens selbst erhobenen Daten. Bei den Internetdokumenten handelt es sich um Selbstdarstellungen der indigenen Kooperative Tosepan Titataniske[2] (in Folge kurz Tosepan genannt) und indigener Menschenrechtsgruppen (z.B. Comisión Takachiualis 2000), sowie um Statistiken der mexikanischen Regierung (z.B. INEGI 2016). Die von mir erhobenen Daten stammen aus Feldforschungen, die ich seit 2003 alle ein bis zwei Jahre durchführte (Feldnotizen 2003–2017). Im Zuge dieser jeweils bis zu drei Monaten dauernden Aufenthalte erfolgten „beobachtende Teilnahmen" an Tätigkeiten und Verhaltensweisen wie auch „teilnehmende Beobachtungen" in Haushalten von *maseualmej* in der Gemeinde San Miguel Tzinacapan und nahegelegenen Orten. Es gab eine Vielzahl von Gesprächen mit unterschiedlichen Personen wie auch lebensgeschichtliche, teilstrukturierte Interviews mit indigenen Frauen (davon acht im Jahr 2005, vier 2006).

Mein Interesse galt haushaltsinternen Machtverhältnissen und ihren Verschiebungen auf Grundlage neu in den Haushalt eintretender Personen, Veränderungen in der Gemeinde und der Region, aber auch der politischen und ökonomischen Situation in Mexiko wie auch auf globaler Ebene. In einer Buchpublikation 2016, basierend auf den Ergebnissen der Forschungen 2003 bis 2015, wurden die Daten von nahezu 400 Personen erfasst – Männer und Frauen größtenteils indigener, aber auch nichtindigener Herkunft aus der Gemeinde San Miguel Tzinacapan und der Distrikthauptstadt San Francisco Cuetzalan (Zuckerhut 2016: 110, 113f).

Die Auswertung der Daten erfolgte in Anlehnung an die konstruktivistische Grounded Theory. Diese erfordert, neben einer Offenheit für Unerwartetes im Feld wie auch im theoretischen Zugang, dass die Daten von Beforschten und Forschenden gemeinsam, interaktiv geschaffen und interpretiert werden (Bernard 2011: 435).

Diese Kooperation in der Forschung begann bereits bei der Auswahl des Haushalts, der im Zentrum meines Interesses stand: Nicht ich wählte den primären Ort meiner sozialen Beziehungen, sondern eine zentrale weibliche Person eines der Wohnhäuser Tzinacapans (die ich in Folge Maria nenne) wählte mich aus. Über die Zeit entwickelte sich zwischen Maria und mir, aller strukturellen Machtverhältnisse zum Trotz, eine enge Bindung, die der einander nahestehender Schwestern entspricht. Die vielfältigen Ungleichheiten, die uns trennen – so die regionale Herkunft (aus einem semiperipheren Land vs. einem kapitalistischen Zentrumsland), die regionale Verortung (Land vs. Großstadt), die soziale und ethnische Herkunft (indigene Waise ohne jegliche Ressourcen vs. aus behütet-konservativen Verhältnissen der weißen unteren Mittelschicht ländlich-österreichischer Prägung stammend), die Ausbildung (marginale Schulbildung und Erlernen zum Überleben notwendiger Fertigkeiten über die Vermittlung durch Verwandte und Bekannte, Beobachtung und Eigeninitiative vs. Universitätsstudium) und der Beruf (primär tätig im Kleinhandel mit Kunsthandwerksprodukten vs. Anstellung im akademischen Bereich) etc. –, bleiben bestehen, sind aber auch ein wichtiger Teil unserer Beziehung. Während meine Schwester für mich ein wesentlicher Bezugspunkt ist und ich ohne sie meine (besser gesagt unsere) Forschungen nicht durchführen könnte, stelle ich für sie eine Art Versicherungssystem dar, auf das bei Bedarf zurückgegriffen wird. Sie wendet sich an mich, wenn es um die Suche nach neuen Möglichkeiten für den Verkauf von Kunsthandwerksprodukten, eine ihrer wesentlichen Einnahmequellen, geht, oder auch im Falle ökonomischer Engpässe durch Krankheit oder andere unvorhergesehene Ausgaben. Sie und ihre Familie zeigen großes Interesse an mir und meinem Körper, an meinem Hygiene-, Schlaf- und Essverhalten (mit entsprechenden Rügen, wenn ich als gefährlich eingestufte Verhaltensweisen an den Tag lege, wie in erhitztem Zustand kaltes Wasser zu trinken oder mich nach dem Essen zu frisieren), an europäischen Lebensweisen, Pflanzen und Tieren, bis hin zu den Merkmalen österreichischer Landwirt-

schaft. Umgekehrt macht mich Maria auf wichtige Ereignisse aufmerksam, die ich nicht versäumen darf, sie macht mich mit Menschen aus ihrem näheren und weiteren Umfeld bekannt und erklärt mir, in welcher Beziehung sie zu ihnen steht und vieles andere mehr. Mit ihr, ihrem Mann, ihrer Tochter und ihrem Schwiegersohn diskutiere ich vergangene und künftige Ereignisse, aber auch die Ergebnisse meiner Forschung, Letztere vor allem auch in Hinblick auf Konsistenz und Missverständnisse.

Es gibt drei weitere Haushalte, mit denen ähnlich enge Beziehungen inklusive dem Austausch von Gütern, Informationen und Wissen bestehen. Da die Haushalte in der Gemeinde in Hinblick auf ökonomische Situiertheit und soziale Einbettung verschieden verortet sind, sind die Ausrichtungen der Debatten etwas unterschiedlich gelagert, was für mich zu einander ergänzenden (manchmal auch widersprüchlichen) Einsichten führt. Darüber hinaus sind auch innerhalb der Haushalte die vorgebrachten Sichtweisen, teilweise auch Verhaltensweisen keinesfalls einheitlich, sondern geprägt von Alter, Geschlecht, Generation, verwandtschaftlichem Status im Haushalt und Ähnlichem.

Die geführten Debatten und resultierenden Erkenntnisse hielt ich in einem Forschungstagebuch fest. Sie sind die Grundlage für weitere reflexiv-analytische Überlegungen und ergänzende Literaturrecherchen und -aufarbeitungen. Der Forschungsprozess zeichnet sich somit durch eine ständige Infragestellung und Neubewertung meines Wissens auf Basis der Diskussionen mit meinen indigenen Verwandten und Bekannten aus, sowie die Lektüre von Ethnografien und Theorien anderer, größtenteils nicht indigener Forscher_innen, die teilweise mit Indigenen zusammenarbeiten, vor allem aber auch die Infragestellung dieses aus der Literatur gewonnenen Wissens (zum Forschungs- und Auswertungsprozess siehe Zuckerhut 2016: 102ff).

3.2 Die Notwendigkeit der Anerkennung unterschiedlicher Ontologien

Ein wesentliches Ergebnis der permanenten Neubewertung und Infragestellung von Informationen unterschiedlicher Art war die Erkenntnis, dass wichtige Theorien und Zugänge zur Beschreibung und Analyse des kapitalistischen Weltsystems, wie die in Kapitel 2 beschriebenen, innerhalb des hegemonial vorgegebenen Rahmens einer naturwissenschaftlich

geprägten „Ontologie des Naturalismus“ (Descola 1996: 82) verbleiben und somit einem *saming* unterliegen (Blaser 2014: 52), d.h. einer Weigerung grundlegend andere Zugänge zur Welt und dem Sein anzuerkennen. Differenz wird verweigert sowie jeglicher konzeptionelle Raum, der der Logik der Beherrschung nicht entspricht, geleugnet, was einem endgültigen Akt von Kolonisierung gleichkommt (Kohn 2015: 320).

Typisch für die dem Kolonialismus und Kapitalismus zugrunde liegenden naturalistischen Epistemologien (Quijano 2000), aber auch für ihre Ontologie (Blaser 2014; Kohn 2015) sind westlich-rationalistische Kosmologien (d.h. Theorien der Welt und des Universums als geordnetes System mit Gesetzen, die dieses regeln; Howell 1996: 129), die sich als einzig gültige präsentieren. Sie basieren auf dem Glauben an eine strikte Trennung von Natur und Kultur wie auch von Körper und Geist sowie auf der Notwendigkeit, Natur (und den damit assoziierten Körper) so weit als möglich zu beherrschen. Einzig die mittels (natur-)wissenschaftlicher Methoden empirisch fassbare Realität wird als gültig anerkannt; andere Ontologien und mit ihnen einhergehende Epistemologien werden als Unsinn und Aberglaube abgewertet (Descola 1996: 82). Festzuhalten ist, dass derlei „andere“ Ontologien nach wie vor in allen Weltregionen, auch in Europa, fortbestehen, wenngleich vielfach marginalisiert, verfemt und daher verborgen sowie sich teilweise mit der dominanten „westlichen Metaphysik“ (Kohn 2015: 320) (d.h. der oben beschriebenen Weise, die Zusammenhänge des Seins als eine einzige Realität zu erklären und dementsprechend zu agieren) überlappend und diese durchkreuzend (vgl. Holbraad 2009: 435). Blaser (2014: 53) verweist auf die Bedeutung des Konzepts der Ontologie (im Unterschied zu dem der Epistemologie), das deutlich macht, dass nicht von einer Realität und vielen Interpretationen oder Kulturen ausgegangen werden darf, sondern von vielen (manchmal miteinander verbundenen) Realitäten oder Welten (ebd.: 56).

Die Aussagen, Praktiken und Vorstellungen der Menschen vor Ort ernstnehmend, was eine zentrale Forderung des Ontological Turns (Kohn 2015: 319) ist, zeigte sich im Verlauf meiner eigenen Forschung, dass es nicht möglich ist, Kategorien wie Produktion, Reproduktion, Verwandtschaft, Religion, Ritual etc. getrennt voneinander zu untersuchen. Insbesondere die getrennte Behandlung des „Materiellen“ und des „Immateriellen“, typisch für das der naturalistischen Ontologie zugrunde liegende

Weltbild, erweist sich als problematisch, vor allem, wenn Fragen von Autorität und Macht im Zentrum des Interesses stehen. Macht bei den *maseualmej* erwies sich in der Folge als etwas, das sich nicht auf einen gesellschaftlichen Bereich oder auf eine Person oder Wesenheit beschränken lässt, ob es sich nun um einen Menschen, ein Tier, eine Pflanze oder ein spirituelles Wesen handelt. Sie ist kosmozentrisch (Viveiros de Castro 1998: 475), d.h. auf alle Wesenheiten (Entitäten) des Kosmos verteilt, wobei die Beziehungen zwischen den Entitäten entscheidend für die jeweilige, sich permanent verändernde Distribution der Macht sind. Deutlich machen lässt sich das anhand der Vorstellung von „Person" als handlungsfähiger Einheit aus Körper und Seelenkräften, wobei diese Einheit nicht immer in derselben Weise gegeben ist, sondern sich im Verlauf des Lebens auf andere Entitäten ausweiten oder aber ihre Reichweite verringern kann.

Die menschliche Person umfasst drei Seelenkräfte, die in unterschiedlicher Weise mit dem Körper verbunden sind. Das *(no)tonal* („(meine) Sonne") ist, wie der Name nahelegt, mit Hitze assoziiert, wird aber zoomorph gedacht, und es befindet sich im Kopf. Über das *(no)tonal* besteht eine Verbindung mit einem oder mehreren Tieren. Im Zaum gehalten wird die Hitze des *(no)tonal* durch das *yekauil* („Schatten"), das kalt und anthropomorph gedacht ist, und ebenfalls im Kopf, vor allem aber im Blut verortet wird. Die dritte Seelenkraft, *(no)yolo* („(mein) Herz"), ebenfalls anthropomorph, aber mit einer gemeinsamen Essenz mit Mais, befindet sich im Herzen. Anders als *(no)tonal* und *yekauil*, die sich im Traum oder durch einen Schrecken (*nemoujtil*) ausgelöst vom Körper trennen können, ist das *(no)yolo* bis zum Tod untrennbar mit dem menschlichen Körper verbunden. Die über die Seeleneinheiten bestehenden Verbindungen des Körpers mit Tieren (*(no)tonal*), Pflanzen (*(no)yolo*), Geistern, Gottheiten und Heiligen (*(no)tonal, yekauil* und *(no)yolo*) sind zu Beginn des Lebens eines Menschen kaum vorhanden, müssen erst geschaffen und gestärkt werden. Mit zunehmendem Alter, verbunden mit bestimmten Ritualen, vor allem aber dem Konsum von Mais, werden die einzelnen Seelenkräfte, wie auch ihre Verbindungen zum menschlichen Körper sowie zu anderen Wesenheiten, stärker und mächtiger. Damit wächst auch die Kraft und Macht der Person und in Folge auch ihre Autorität in Haushalt und Gemeinde, ebenso wie ihre Stärke gegenüber Kräften des „Übernatürlichen". Entscheidend ist, dass ein ausgewogenes Verhältnis der drei

Einheiten eingehalten wird (Zuckerhut 2016: 81ff). Wächst eine der Seelenkräfte auf Kosten der anderen, so hat das negative Folgen. Wenn beispielsweise aufgrund von unmäßigen Alkoholkonsum die Hitze und damit das *(no)tonal* zunimmt, ohne ergänzende Stärkung von *yekauil* und *(no)yolo*, dann kommt der tierische, unkontrollierbare Charakter eines Menschen, seine Bestialität, zum Vorschein, was häufig zu unkontrollierten Ausbrüchen von Gewalt führt (ebd.: 164, 261, 266f).

Die Bedeutung von Ausgewogenheit, von Harmonie, zeigt sich auf verschiedenen Ebenen: auf der des menschlichen Individuums, des Haushalts, der Gemeinde und des Kosmos. Zu ihrer Erhaltung wie auch ihrer Stärkung und Wiederherstellung im Falle einer Störung müssen jeweils entsprechende Rituale durchgeführt werden, viele davon integriert in Feste für katholische Heilige (siehe Kapitel 3.4). Die Vereinnahmung des Katholizismus als Bestandteil kosmozentrischer Ontologie und deren Verknüpfung mit der egozentrischen Logik kapitalistischer Lebens- und Wirtschaftsform ist die Basis des bislang erfolgreichen Widerstands gegen eine „spirituelle Enteignung" (als letztendlicher Sieg kolonialer und kapitalistischer Akkumulationsprozesse) und die damit einhergehende Vereinnahmung durch die im kapitalistischen Weltsystem hegemoniale Ontologie des Naturalismus.

3.3 Akkumulation durch Enteignung

Dabei war die Region im Verlauf der Geschichte verschiedenen, nicht nur spirituellen Enteignungsprozessen ausgesetzt. In der Kolonialzeit war das Gebiet, bedingt durch die Gebirgslage, nur schwer zugänglich und eignete sich nicht für Plantagenwirtschaft. Darüber hinaus gab es keine für die Spanier_innen interessanten Bodenschätze. Daher blieb der Bezirk auch bis ins 19. Jahrhundert im Randbereich kolonialer Eingriffe. Zwar wurden Abgaben eingehoben, aber es waren kaum *coyomej* vor Ort. Ab 1570 erlitt die Bevölkerung allerdings einen starken Rückgang aufgrund von Epidemien. Nach einem Tiefpunkt mit 1.444 Tributpflichtigen im 17. Jahrhundert erholte sie sich wieder und zählte Ende des 18. Jahrhunderts 8.813 Tributpflichtige (Lupo 1995: 34; 2001: 340f).

Nach dem Ende der Kolonialzeit (ab 1821) war die Regierung des neu geschaffenen mexikanischen Nationalstaats bestrebt, die Bevölkerung des Landes zu „verbessern". Dies sollte durch die Förderung von Einwan-

derung aus Europa erreicht werden, da angenommen wurde, Europäer_innen wären den Indigenen rassisch und kulturell überlegen (Alonso 2005: 40). Darüber hinaus sollten Wirtschaft und Politik „modernisiert", d.h. Privateigentum und privates Unternehmertum vorangetrieben werden. Aus der Kolonialzeit tradierte Sonderrechte indigener Gemeinden, insbesondere das Gemeineigentum an Land, standen diesen Bestrebungen im Weg und mussten abgeschafft werden. 1828 wurde das *Ley de desamortización de Fincas Rusticas e Urbanas* (bekannt auch als *Ley Lerdo*) erlassen, das die Auflösung zivilen und kirchlichen gemeinschaftlichen Grundbesitzes anordnete. Offiziell sollte dieses Gesetz die Kirche enteignen, tatsächlich aber waren zunehmend die Ländereien indigener Gemeinden davon betroffen (Ramírez Suárez et al. 1992: 15).

Mehrere italienische Familien ließen sich in Cuetzalan nieder und eigneten sich – auf der Basis des neuen Gesetzes, aber auch mittels Gewalt, Betrug, Täuschung und Übervorteilung der lokalen Bevölkerung – das beste Land im Umfeld der heutigen Bezirkshauptstadt an (ebd.: 13; Argueta 1994: 125, 133ff). Wohlhabende, nicht indigene mexikanische Familien folgten. Die *maseualmej* waren zunehmend gezwungen, vom gemeinschaftlichen Landbesitz abzugehen und zu versuchen, private Landtitel zu erlangen (Zuckerhut 2016: 133f).

Die im Zusammenhang mit der nationalen Unabhängigkeit in die Wege geleiteten Enteignungsprozesse setzten sich nach der mexikanischen Revolution (1910–1920) fort. Es gab vereinzelte, jedoch nur mäßig erfolgreiche Bestrebungen, ehemaliges Kommunalland als *ejido* (staatliches Land, das Gruppen von Personen zur individuellen oder gemeinschaftlichen Nutzung überlassen wird) anerkennen zu lassen (Thomson 1991: 248f; Ramírez Suárez et al. 1992: 17ff). Arme Landbewohner_innen aus anderen Teilen Mexikos, die vor den Revolutionskämpfen geflohen waren, ließen sich im Bezirk Cuetzalan nieder (Arizpe 1973: 33) und eigneten sich ihrerseits – unter dem Slogan der Revolution „Das Land denen, die es bearbeiten" – seit Jahrhunderten von Indigenen gemeinschaftlich beanspruchtes Land an (Zuckerhut 2018: 73). Verstärkt wurde die Privatisierung von Grund und Boden durch Kampagnen der Distriktverwaltung in den 1920er und 1930er Jahren zur Feststellung der Besitzer_innen einzelner Parzellen (Arizpe 1973: 88). Seither dominiert auch unter den *maseualmej* Privatbesitz an Land – größtenteils in Form von kleinen Parzellen von circa

einem Hektar. Um eine Familie durchschnittlicher Größe zu versorgen, sind mindestens zwei Hektar notwendig (Beaucage/Taller de Tradición Oral del CEPEC 2012: 109f). Um (über-) leben zu können musste und muss folglich Land dazu gepachtet werden, und es wurden und werden – neben Herstellung und Verkauf von Kunsthandwerksprodukten – bezahlte Arbeiten abseits der eigenen Subsistenzwirtschaft angenommen (Feldnotizen 2003–2017). Viele *maseualmej* verdingten sich zur Erntezeit auf den Zuckerrohrfeldern und plantagen in Cuetzalan wie auch an der Küste von Veracruz, aber auch auf den seit Ende des 19. Jahrhunderts etablierten Kaffeefincas Cuetzalans (Zuckerhut 2016: 136ff). Daneben begannen sie selbst, Zuckerrohr und Kaffee für den Verkauf anzubauen (Arizpe 1973: 61; Martínez Borrego 1991: 66).

Aufgrund der wachsenden Bedeutung von Erzeugnissen für den Weltmarkt zur Erlangung von Devisen für die mexikanische Wirtschaft wurde das Straßennetz nach Cuetzalan ausgebaut, um die Transportmöglichkeiten für und damit die Vermarktung von Cash Crops (d.h. für den Verkauf am globalen Markt hergestellte Produkte) wie Kaffee zu erleichtern (Arizpe 1973: 64, 96). Das 1958 gegründete staatliche Kaffeeinstitut Instituto Mexicano del Café (INMECAFÉ) motivierte zusammen mit dem seit 1948 bestehenden Instituto Nacional Indigenista (INI) Kleinbauern_bäuerinnen zum Einstieg in den Kaffeeanbau, indem es die Vermarktung übernahm und fixe (jedoch unter den Produktionskosten liegende) Preise zusagte (ebd.: 37f, 65). Ende der 1970er Jahre gab es darüber hinaus günstige Kredite zur Erneuerung der Kaffeegärten. Gefördert wurde ein Abgehen von der traditionellen Mischpflanzung hin zu Monokulturen mit ertragreichen, aber empfindlichen Sorten, die einen hohen Aufwand an Pflege, künstlichem Dünger und Pestiziden benötigen. Immer mehr ursprünglich dem Subsistenzmittel Mais gewidmete Anbauflächen wurden in solche für Kaffee umgewandelt (Beaucage/Taller de Tradición Oral del CEPEC 1997: 47, 60; Moguel/Toledo 1999: 17f).

Zwar war das Nettoeinkommen in den modernisierten Kaffeekulturen pro Hektar zehnmal höher als das des besten Maisfeldes, die Lebensbedingungen der Kaffee anbauenden *maseualmej* verschlechterten sich jedoch. Abgesehen von den teuren Produktionskosten, bedingt durch Düngung und Pestizide, musste nun in vielen Haushalten das Grundnahrungsmittel Mais käuflich erworben werden (wobei von *maseualmej* hergestellter

Mais bevorzugt wurde; vgl. dazu Kapitel 3.4). Ebenso mussten Feuerholz, Kräuter, Obst, Gemüse und andere Nutzpflanzen, in den „traditionellen", auf Mischkultur beruhenden Kaffee- und Obstgärten in Überfluss vorhanden, am Markt gekauft werden (Beaucage/Taller de Tradición Oral del CEPEC 1997: 48, 51, 61). Die entstandene Situation der Armut verschärfte sich Ende der 1980er Jahre mit dem im Zuge der Aufkündigung des Weltkaffeeabkommens durch die USA und andere Länder rapiden Preisverfall für Rohkaffee am Weltmarkt. INMECAFÉ wurde aufgelöst und die Förderprogramme für Kleinbauern_bäuerinnen wurden eingestellt (Baum/Offenhäuser 1994: 43f; Moguel/Toledo 1999: 12; Talbot 2011: 79f). Ein Frost im Dezember 1989 vernichtete darüber hinaus einen großen Teil der empfindlichen Kaffeesträucher (Beaucage/Taller de Tradición Oral del CEPEC 2012: 88).

3.4 Gegen die Akkumulation durch Enteignung: die Verschränkung von Subsistenz- und Cash-Crop-Produktion

Mit dieser existenziellen Bedrohung vieler *maseualmej* war ein Wendepunkt erreicht. Die kleinbäuerliche Bevölkerung Cuetzalans reagierte nicht mit dem Verkauf der verbliebenen Ressourcen und Abwanderung, sondern mit einer Neuausrichtung der Wirtschaft. Zum einen wurden und werden alternative Einkommensformen im Tourismus aufgegriffen (wie Herstellung und Verkauf von Kunsthandwerksprodukten, Errichtung und Betrieb von Ökohotels, Erzeugung und Vermarktung von Naturkosmetika, Organisation von Erlebnis- und Abenteuertouren etc.) (Zuckerhut 2016: 167ff; Feldnotizen 2017). Zum anderen wurde vom Kaffeeanbau in Monokultur abgegangen und stattdessen Bio-Kaffee in diversifizierten Anbausystemen (*polyculture*) hergestellt (Moguel/Toledo 1999, 2004; Beaucage/Taller de Tradición Oral del CEPEC 2012: 113ff). Neben Kaffeesträuchern finden sich in den ökologischen „Kaffeegärten" (*cafetales*) Obst- und andere Schattenbäume, Kräuter, Beeren u. Ä. (deren Produkte/die konsumiert, verkauft oder auch für Handwerks- und Kunsthandwerksprodukte genutzt werden können), und es ist auch wieder Brennholz verfügbar (Zuckerhut 2016: 144).

Einen wesentlichen Anteil an dieser Entwicklung hatten indigene Organisationen wie die Kooperative Tosepan, die Frauenorganisation Maseualsiuamej Mosenyolchikauanij, die Menschenrechtsorganisation Comisión Takachiualis und ähnliche Initiativen (unterstützt durch Akti-

vitäten nichtindigener Katholik_innen) (Zuckerhut 2016: 222ff). Sie alle sind Ausdruck eines gestärkten indigenen Bewusstseins, das seit den 1990er Jahren, in Zusammenhang mit dem „Aufstand" des Ejército Zapatista de Liberación Nacional (EZLN, auch unter der Kurzbezeichnung „Zapatistas" bekannt) 1994 in Chiapas ins Blickfeld der Öffentlichkeit rückte. Eine Reihe indigener Gruppen aus ganz Mexiko beteiligte sich in Folge an der Ausarbeitung des Abkommens Comisión de Concordia y Pacificación (COCOPA, 1996), in dem die Rechte „indigener Völker" dargelegt und eingefordert werden (Köhler 2003: 234f). Die *maseualmej* Cuetzalans sind Teil dieses überregionalen Netzwerks (Feldnotizen 2006–2017).

Im Zusammenhang mit dem neuen Selbstbewusstsein, der damit einhergehenden Wertschätzung der von *coyomej* wie auch von *maseualmej* als indigen bezeichneten Lebensweisen (die sich größtenteils in der Kolonialzeit entwickelten und sich seither den jeweiligen Gegebenheiten anpassen und somit verändern) und der Forcierung einer „Indigenität von unten" wird seitens der *maseualmej* dem Anbau und Konsum von Mais durch die und in den jeweiligen Haushalten sowie der Durchführung religiös-ritueller Aktivitäten erhöhte Beachtung geschenkt (Zuckerhut 2018). Damit verbunden ist eine Stärkung der kosmozentrischen Ontologie, die durch die oben beschriebenen Umstrukturierungen der Wirtschaft (Kapitel 3.3) an Bedeutung zu verlieren drohte.

Denn wie in Kapitel 3.2 ausgeführt, ist Mais ein wesentlicher Bestandteil dieser Ontologie. Er ist ein zentraler Aspekt des Menschseins und Quelle des Lebens. Einzig der Mais ist in der Lage, den Menschen in seiner körperlich-seelischen Gesamtheit zu ernähren. Mensch und Mais haben eine gemeinsame Essenz, sie entwickeln sich analog vom Kühlen, Feuchten hin zum Heißen, Trockenen und weisen ähnliche Eigenschaften auf. Aussaat, Pflege und Verarbeitung von Mais bedürfen bestimmter Rituale (auf die ich hier aus Platzgründen nicht eingehe), damit er seine lebensspendende Kraft erhält (d.h. von *coyomej* hergestellter Mais entspricht nicht den Anforderungen und wird als minderwertig abgelehnt) (Beaucage/Taller de Tradición Oral del CEPEC 2012: 102; Zuckerhut 2016: 152ff). Idealerweise säen Männer den Mais aus und ernten ihn auch, während Frauen für seine Verarbeitung zuständig sind (Feldnotizen 2003–2017; Zuckerhut 2010: 61). Selbst in Haushalten ohne Maisfeld sehen sich Männer als Produzenten von Mais, Frauen als Produzentinnen von Tortillas und anderen Maisge-

richten. Die Arbeit von Männern ist dementsprechend *tekit* (d.h. sie erfordert Kraft und Energie), die von Frauen *chiualis* (d.h. sie impliziert Wissen, Kreation, Transformation und Umverteilung) (Beaucage/Taller de Tradición Oral del CEPEC 2012: 102ff).

Mais wird mit Gemeinschaftlichkeit assoziiert: Das Land, von dem der Mais stammt, gilt als das Land des gesamten Haushalts, der aus mehreren miteinander verwandten Kernfamilien bestehen kann und stellt somit eine Variante des kolonial-indigenen Gemeindelandes, übertragen auf Haushaltsebene, dar. Der alltägliche gemeinsame Konsum von Mais im Haushalt schafft über das Teilen der mit ihm assoziierten gemeinsamen Essenz (des *(no)yolo*) soziale Nähe und Verwandtschaft. Durch den Verzehr von Maistortillas bei den Gastmählern der zahlreichen Feste (und ihrer gemeinschaftlichen Erzeugung durch die Frauen des Haushalts und die Besucherinnen) wird diese Zusammengehörigkeit auf Nachbarschaft und Gemeinde ausgeweitet. Zu Allerheiligen werden auch die Toten in diese Gemeinschaftlichkeit mit einbezogen, indem auf den Hausaltären Speisen aus Mais aufgestellt werden (Zuckerhut 2018: 78f).

Es gibt folgerichtig ein Bestreben der Haushalte, dieses wichtige Subsistenzprodukt selbst herzustellen, wenngleich das nicht allen gleichermaßen möglich ist. Größtenteils sind dafür die mit dem Maisanbau verbundenen monetären Kosten verantwortlich. Da meist kein eigener Landbesitz vorhanden ist, müssen Anbauflächen gepachtet werden. Aussaat und Ernte erfordern einen erhöhten Arbeitsaufwand, der von den (männlichen) Mitgliedern eines Haushalts alleine nicht bewältigt werden kann. Tagelöhner (in der Regel aus dem eigenen verwandtschaftlichen Umfeld stammend) müssen angeheuert und bezahlt werden (Feldnotizen 2005, 2011; Beaucage/Taller de Tradición Oral del CEPEC 2012: 87).

Das erforderliche Geld zur Finanzierung des Maisanbaus stammt aus der Erzeugung und Vermarktung von Cash Crops wie Kaffee und anderen Einkünften, d.h. nur Haushalte mit ausreichendem Zusatzeinkommen können sich seinen Anbau leisten. Anders als Mais werden für den Verkauf hergestellte Produkte nicht mit Gemeinschaft und Verwandtschaft assoziiert, sondern haben eine starke individuelle Konnotation. Das *cafetal*, insbesondere die einzelnen Kaffeesträucher, gilt/gelten als persönlicher Besitz Einzelner; monetäre Einkünfte aus seiner Bewirtschaftung wie auch solche aus Lohnarbeit oder der Vermarktung von Kunsthand-

werk sind individuell, d.h. die betreffende Person kann über ihre Verwendung frei verfügen und ist nicht verpflichtet, sie mit Mitbewohner_innen ihres Haushalts zu teilen. Junge unverheiratete Menschen nutzen ihr Geld oft zum Erwerb von Statusgütern wie Fernsehern, Stereoanlagen etc. (Zuckerhut 2016: 244ff). Verheiratete hingegen verwenden es für familiäre Ausgaben – neben der Finanzierung des Maisanbaus für den (Aus-) Bau von Häusern –, vor allem aber, vorausgesetzt er_sie ist Vorsteher_in eines eigenen Haushalts, zur Erlangung sozialen Prestiges über die Organisation und Ausrichtung von Festen, dem zweiten Mittel zur Stärkung der drei Seeleneinheiten des Menschen und damit von Indigenität. Dieses zweite Mittel gewinnt in den letzten Jahren zunehmend an Bedeutung (ebd.: 194, 209f).

Die Beliebtheit der Ausrichtung eines Festes liegt darin, dass sie – über die Festigung der Seelenkräfte und damit einhergehender größerer Macht – nicht nur Indigenität im Allgemeinen, sondern auch die Position eines Mannes_einer Frau und seines_ihres Haushalts in der Gemeinde im Besonderen stärkt und ihm_ihr die Möglichkeit gibt, in der lokalen Ämterhierarchie aufzusteigen. Anlässe zum Feiern gibt es viele – die Taufe eines Kindes, sein dritter Geburtstag, Firmung, Heirat etc., in neuerer Zeit auch individuelle Geburtstage, die Anschaffung eines Autos und Ähnliches. Besonders bedeutsam für die Schaffung und Erhaltung des *maseual*-Seins (und mit höherem Prestige für die Organisator_innen verbunden) sind die Festivitäten für die zahlreichen Heiligen (*mayordomías*) (eingeführt in der Kolonialzeit und seitens der *maseualmej* entsprechend ihren Anforderungen adaptiert), die je nach Bedeutung des_der Heiligen unterschiedlich aufwändig sind (Zuckerhut 2016: 180ff). Die Zahl der zu feiernden Heiligen San Miguel Tzinacapans und damit der Möglichkeiten der Ausrichtung einer *mayordomía* hat sich in den letzten Jahren erhöht – wurden im Jahr 2000 25 Heilige genannt (Comisión Takachiualis 2000), so sind es 2017 40 (Feldnotizen 2017).

Höhepunkt des jährlichen Festzyklus ist das Fest des Schutzheiligen, an dem die gesamte Gemeinde in der einen oder anderen Weise beteiligt ist. Die Verantwortung für sein Wohlergehen wird von einem Haushalt jeweils für ein Jahr übernommen und ist mit einer Reihe von mehr oder weniger aufwändigen Gastmählern verbunden. Mehrmals im Jahr müssen Gäste und Mithelfende (für die Herstellung des Essens, des Fest-

schmuckes etc.) bewirtet werden. Zu Beginn und vor allem am Ende der Periode sind das mehrere hundert Menschen, die gemeinsam Tortillas aus Mais und andere Lebensmittel konsumieren. Auf diese Weise wird ihre Zusammengehörigkeit hergestellt und bestätigt (Zuckerhut 2018: 79f). Über die Feste wird allerdings nicht nur die Verbundenheit der Gemeinde hergestellt, sondern vor allem auch die Verbindung der Menschen mit den Heiligen und – über die durchgeführten Tänze und Rituale – mit einer Reihe anderer über/natürlicher Wesenheiten. Es zeigt sich darin das notwendige Zusammenwirken aller Wesen des Kosmos für ein „gutes", ein lebenswertes Leben im Verständnis der *maseualmej*. Die *mayordomía* für den Gemeindeschutzheiligen Michael sei besonders authentisch und durch eine besondere Spiritualität geprägt, wird folgerichtig seitens der Einwohner_innen San Miguel Tzinacapans immer wieder betont (Rodríguez Blanco 2011: 123; Feldnotizen 2013; Zuckerhut 2016: 201, 234). Ihre Übernahme erlangt besonders in Krisenzeiten, z.B. bei schwerer Krankheit eines Haushaltsmitglieds, an Bedeutung, da sie wesentlich zur (Wieder-)Herstellung der Harmonie der kranken Person, des Haushalts und des Kosmos beiträgt (Zuckerhut 2016: 194f).

4. Gelebte Pluriversalität

Die fortgesetzte Schaffung und Bestätigung von Harmonie und Gemeinsamkeit – einer Gemeinsamkeit, die nicht nur den Haushalt und die Gemeinde, sondern, über die Verbindung mit dem Übernatürlichen, den gesamten Kosmos umfasst – ist letztendlich entscheidend für die fortgesetzte Existenz der Indigenen Tzinacapans als *maseualmej* (im Unterschied zu *coyomej*), trotz aller Enteignungsprozesse. Das kommt auch in der Aussage der *maseual siuat* (sinngemäß übersetzt: weibliche Indigene) Aída Rodríguez in einem Interview mit der Soziologin Massieu Trigo im Jahr 2014 zum Ausdruck, in der sie hervorhebt, dass das Entscheidende im Erfolg der Indigenen Cuetzalans gegen versuchte Enteignungen im Zuge der Modernisierungsprozesse der vorangegangenen zwei Jahrhunderte (siehe Kapitel 3.3 und 3.4) in ihrer Kollektivität, in den kollektiven Praktiken in Form von Versammlungen, aber auch in den Beziehungen zu nichtmenschlichen Wesenheiten liege (Massieu Trigo 2017: 140f).

Diese Betonung der Kollektivität als Ausdruck (und zur Erhaltung) kosmozentrischer Ontologie, die alle Wesen des Kosmos – Gottheiten, Geister, Heilige, Menschen, Tiere, Pflanzen etc. – umfasst, verbindet sich mit Individualität und Orientierung an marktwirtschaftlichen Prinzipien als zweitem Aspekt erfolgreicher Praktiken zur Erhaltung (durch Adaptierung) von *maseual*sein. Im Haushalt wird das in der Koexistenz und teilweisen Verschränkung von kollektiven Aspekten in Zusammenhang mit Subsistenz und Mais – eng verbunden mit dem *(no)yolo*, (Kapitel 3.1) –, mit individuellen Aspekten bezogen auf Geld und auf Produkte, die für den Markt erzeugt werden (das Individuum steht für sich, die Relationen zu den verschiedenen Wesenheiten des Kosmos spielen in dieser Ontologie keine Rolle) (Kapitel 3.4) deutlich. Ersteres steht für eine indigene kosmozentrische, Letzteres für eine westlich egozentrische Ontologie. Versuchter kolonialer und kapitalistischer Enteignung wurde und wird mit Aneignung begegnet – Aneignung christlicher Heiliger, Aneignung von Kaffeeanbau, Aneignung von Privateigentum etc. – und der Integration dieser „neuen" Elemente in bestehende Formen der religiösen Spiritualität, des Wirtschaftens und der Politik (wobei Politik mit Wirtschaft, Wirtschaft mit Politik und beides untrennbar mit Spiritualität verknüpft ist, wie die in Kapitel 3.4 beschriebene Bedeutung von Festen deutlich macht). Sowohl-als-auch, nicht „entweder-oder" ist die Devise, weswegen von einer „gelebten Pluriversalität" gesprochen werden kann (Zuckerhut 2017b), d.h. der wechselseitigen und dialogischen Verschränkung unterschiedlicher Wissens- und Seinssysteme, die als gleichwertig anerkannt und entsprechend gelebt werden (Mignolo 2012: 205f).

Diese gelebte Pluriversalität (als eine Verbindung von kapitalistisch-individueller Cash-Crop- und kosmozentrisch-gemeinschaftlicher Subsistenzproduktion bzw. der Nutzung Ersterer zur Erhaltung Letzterer) erweist sich langfristig als erfolgreicher, Akkumulationsprozessen zu widerstehen (wobei diese nicht vollständig verhindert, nur den eigenen Bedürfnissen entsprechend adaptiert werden können), als aktive (wenngleich in bestimmten Situationen absolut notwendige), mitunter auch gewaltsame Formen des Widerstands, die in der Vergangenheit zur Ermordung zahlreicher *maseualmej* führten (so gab es in den 1930er und den 1970er Jahren eine starke Landarbeiter_innenbewegung, an der viele Einwohner_innen Tzinacapans beteiligt waren, die blutig niedergeschlagen wurde)

(Zuckerhut 2016: 221f). Sie erlaubt nicht nur das physische Überleben, sondern verhindert auch ein Aufgehen der Indigenen in der mexikanischen Mehrheitsbevölkerung, indem es ihr „Anderssein" (das aber immer wieder an neue Bedingungen angepasst wird) stärkt. Damit widerstehen sie dem letzten Akt von Kolonisierung, „one that would subject the possibility of something else, located in other lived worlds, human and otherwise, to a far more permanent death" (Kohn 2015: 320). Prozesse der (fortgesetzten) ursprünglichen Akkumulation sind folglich nur bedingt erfolgreich – kosmozentrische Ontologie bildet die Basis eines beständigen, wenngleich sich den jeweiligen Gegebenheiten anpassenden Andersseins, das *maseual*sein kennzeichnet. Rosa Luxemburgs (1985) Überlegungen fortgesetzter gewaltsamer Enteignungsprozesse als Wesensmerkmal des Kapitalismus erweisen sich somit als hilfreiches Analysemittel, das aber durch Zugangsweisen des Ontological Turn (Blaser 2014) ergänzt und adaptiert werden muss, um die Grenzen kapitalistischer Vereinnahmung und der damit einhergehenden scheinbar unentrinnbaren Omnipotenz des kapitalistischen Weltsystems aufzuzeigen. Denn, wie schon die Zapatistas in Chiapas festhielten: Eine andere Welt ist möglich – eine Welt, in der viele Welten Platz haben (Escobar 2017: 337).

1 http://www.cuentame.inegi.org.mx/monografias/informacion/pue/territorio/div_municipal.aspx?tema=me&e=21, 30.9.2018.

2 http://www.tosepan.org/, 30.9.2018.

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Abstract *The article summarises advancements of Rosa Luxemburg's analysis of capitalism as a system, based on the ongoing exploitation of non-capitalist economic domains. These theories remain imprisoned in a naturalistic ontology prevailing in the capitalist system. To break up this ontology, and with it a decolonisation of thinking and being, requires the appreciation of other ontologies and their dialogic entanglement (pluriversality), as well as consequent actions. This dialogic entanglement is not just an issue of decolonial oriented scientists. The paper also shows how the indigenous population, the maseualmej of the Mexican district of Cuetzalan del Progreso, affected by processes of ongoing primitive accumulation, eludes definitive colonisation by means of pluriversal entanglement of different ontologies.*

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Luxemburg's Critique of Capital Accumulation, Reapplied in Africa

Abstract *Rosa Luxemburg's Accumulation of Capital provided Africa's first known Marxist account of class, race, gender, society-nature and regional oppressions. She was far ahead of her time in grappling with the theory and practice of capitalist/non-capitalist relations that today not only characterise Western multinational corporate extraction but also that of firms from several contemporary 'emerging' economies. This article contends that in her tradition, two recent areas of analysis now stand out, even if they have not yet received sufficient attention by critics of underdevelopment: the expanded understanding of value transfers from Africa based on natural resource depletion; and the ways that collaborations between imperial and subimperial national powers (and power blocs) contribute to Africa's poverty. Using these two newly-revived areas of enquiry, several aspects of Luxemburg's Accumulation of Capital stand out for their continuing relevance to the current conjuncture in contemporary Africa: capitalist/non-capitalist relations; natural resource value transfer; capitalist crisis tendencies and displacements; imperialism then and imperialism/subimperialism now; and the need to evolve from protests to solidarities through socialist ideology.*

Keywords *accumulation by dispossession, Africa, imperialism, natural resources, subimperialism*

1. European capitalist enclaves versus Africa's non-capitalist society and nature

Rosa Luxemburg's (2003 [1913]) *Accumulation of Capital* was her attempt at advancing Marxist theory at a time, just before World War I, when internecine competition between major capitalist powers was generating unprecedented tensions across Europe. The preceding years had already witnessed major political-economic analyses of imperialism, such those as by John Hobson (1902) and Otto Bauer (1907), focusing on capital export, and by Rudolf Hilferding (1981 [1910]) who argued that *Finance Capital* fused various fractions of capital under the influence of the half-dozen largest banks. In subsequent years, Nicolai Bukharin (1972 [1915]: 104) identified "increased competition in the sales markets, in the markets of raw materials, and for the spheres of capital investment" as the "three roots of the policy of finance capitalism." Vladimir Lenin (1986 [1917]) would contribute further aspects of inter-imperial rivalries that brought capitalist classes, their states and their hinterlands into conflict, in opposition to what Karl Kautsky (1914) envisaged would be a more peaceful stage of "ultra-imperialism" due to the self-interest the major corporate groups had in collaborating with each other across borders (for a survey see Brewer 1980).

Using a very different lens, Luxemburg watched imperialist processes unfold mainly by examining how capital super-exploited the non-capitalist spheres in Europe's colonies. For Luxemburg (2003: 426), "[i]mperialism is the political expression of the accumulation of capital in its competitive struggle for what remains still open of the non-capitalist environment." Under conditions of overaccumulation crisis, she argued, capitalism would turn ever more frantically to extra-economic extraction of surpluses:

> "Accumulation of capital periodically bursts out in crises and spurs capital on to a continual extension of the market. Capital cannot accumulate without the aid of non-capitalist relations, nor… can it tolerate their continued existence side by side with itself. Only the continuous and progressive disintegration of non-capitalist relations makes accumulation of capital possible. Non-capitalist relations provide a fertile soil for capitalism; more strictly: capital feeds on the ruins of such relations, and although this non-capitalist milieu is indispensable

> for accumulation, the latter proceeds at the cost of this medium nevertheless, by eating it up. Historically, the accumulation of capital is a kind of metabolism between capitalist economy and those pre-capitalist methods of production without which it cannot go on and which, in this light, it corrodes and assimilates." (Luxemburg 2003: 327)

For Luxemburg, imperialism was not a process simply of capital flowing into a region and setting up compatible class relations. Her orientation to Marx's reproduction schemas – notwithstanding the flaws therein (Hopfman 2007) – indicated how the ebb and flow of capital and the rise of crisis tendencies together generated and accelerated uneven development:

> "Marx emphasises perpetual 'overproduction', i.e. enlarged reproduction, since a strict policy of simple reproduction would periodically lead to reproductive losses. The course of reproduction shows continual deviations from the proportions of the diagram which become manifest
> (a) in the fluctuations of prices from day to day;
> (b) in the continual fluctuations of profits;
> (c) in the ceaseless flow of capital from one branch of production to another, and finally in the periodic and cyclical swings of reproduction between overproduction and crisis." (Luxemburg 2003: 76)

It is well understood – by Marxists (and a very few others) – how in today's crisis-ridden world, perpetual overproduction has caused a long stagnation since the 1970s, characterised by "periodic and cyclical swings of reproduction between overproduction and crisis" (Luxemburg 2003: 76). Capital's turn towards ever-more intense bouts of 'accumulation by dispossession' – the term used by Harvey (2003) to re-articulate Luxemburg's insights on capitalist theft from the non-capitalist spheres – means that observations she made in 1913 retain relevance today.

For example, Luxemburg (2003: 447) argued that capitalism "is the first mode of economy which is unable to exist by itself, which needs other economic systems as a medium and soil… In its living history it is a contradiction in itself, and its movement of accumulation provides a solution to the conflict and aggravates it at the same time." To illustrate, in *The Accumulation of Capital*, Luxemburg (2003) recounted several vital historical

examples of simple commodity reproduction and capitalist/non-capitalist relations: ancient Germans (the mark communities); the Inca of Latin America; India; Russia; the French versus Algerians; the Opium Wars in China; mechanisation versus the interests of U.S. farmers; debt in late-19th century Egypt; and conditions of early 20th century resource extraction and socio-political organisation in South Africa, Namibia, Zimbabwe, Zambia, and the Democratic Republic of the Congo (DRC), i.e., the core sites of British-German-Belgian imperialism.

It would be 50 years before her focus on capitalist/non-capitalist relations were again pursued with Marxist rigour. In West Africa's Ivory Coast, French anthropologist Claude Meillassoux (1925-2005) carried out studies on the Guro women's role in what he termed 'domestic economy,' especially its articulation with wage labour during the 1960s. During the 1970s, South African sociologist Harold Wolpe (1926-1996) applied Meillassoux's (1975) ideas to help revive and regenerate his South African Communist Party's tradition of race-class debate (Wolpe 1980). And in 1978 Anne-Marie Wolpe (1930-2018) contributed a much more gendered analysis of social reproduction within articulations of modes of production (Kuhn/Wolpe 1978).

In 1973, Egyptian political economist Samir Amin (1931-2018) published his theory of unequal exchange based on surplus value transfers associated with lower productivity (especially in Africa) in relation to the North's higher productivity outputs sold to the South, and his many subsequent books elaborated the geopolitical implications of imperial power. At one point soon thereafter, when reviewing early theories, Amin (1977: 258) claimed that "Luxemburg did not really understand imperialism" and "confused new imperialism with old expansionism." Nevertheless, later he reassessed her work and upgraded his view considerably, as noted below. At the same time, Ugandan Marxist Dani Nabudere (1929-2011) was critical of the "Luxemburgist thesis" that "is at the back of today's 'centre-periphery' ideology." Nabudere (1979: 12) insisted, "[f]or Luxemburg, imperialism is no more than the struggle by the capitalist countries 'for what remains of the non-capitalist world'," leading to a major "deviation from the Marxist thesis." However, the durability of capitalist/non-capitalist relations meant that value transfers and extreme uneven development would continue to be studied by Africa's applied economists, such as Malawian economist Guy

Mhone (1943-2005) with his unique theory of 'economic enclavity' during the 1980s (Mhone 2001).

By the 1990s, a series of Marxist theorists working in Africa had brought into our world view, respectively, explanations of uneven development emphasising historic and world-imperialist processes (Luxemburg), patrilineal extraction (Meillassoux), labour productivity differentials (Amin), South African super-exploitation (the Wolpes) and regional Southern African labour migration (Mhone). In various ways, all generated fruitful engagements when considering the political economy of friction between capitalist and non-capitalist social relations. Unfortunately, the 1980s-90s experienced a relatively infertile scholarly terrain, so this tradition receded, given the debilitating environment of austerity and triumphant liberalism in Africa, especially in intellectual milieus including universities.

Nevertheless, the 21st century has witnessed a rebirth of Luxemburgist arguments about imperialism, as shown below. Partly this revival can be traced to renewed political-economic analysis by David Harvey, specifically *The New Imperialism* (2003), which re-introduced Luxemburg through the concept of accumulation by dispossession. By 2017, Harvey's *Marx, Capital and the Madness of Economic Reason* had more forcefully acknowledged not only non-capitalist environmental goods and services as 'free gifts of nature' within the circuitry of capital, but also non-capitalist social reproduction (gendered by patriarchal socio-political culture) as vital 'free gifts of human nature' to capital (Harvey 2017: 96). The latter exist in all societies, given the way household and community relations draw upon women's unpaid labour power. However, it is the former – the natural resource depletion that Africa most relies upon – that helps explain Africa's unique impoverishment, a topic we turn to next.

2. From dispossession of natural economy to natural resource depletion

Luxemburg's (2003: 347) strategy for exploring accumulation in 1913 was concerned not only with the 'commodity economy' and 'the competitive struggle of capital on the international stage,' but also for 'natural economy,' a category that included pre-capitalist social relations as well as

nature. "What is most important," Luxemburg (2003: 349) wrote, "is that, in any natural economy, production only goes on because both means of production and labour power are bound in one form or another," unlike capitalism in which machinery is often introduced at the expense of jobs, as production becomes increasingly capital intensive. She includes within the category 'natural economy' various features of the environment: "land, game in primeval forests, minerals, precious stones and ores, products of exotic flora such as rubber, etc." In such economies, she argued,

> "The communist peasant community no less than the feudal corvee farm and similar institutions maintain their economic organisation by subjecting the labour power, and the most important means of production, the land, to the rule of law and custom. A natural economy thus confronts the requirements of capitalism at every turn with rigid barriers. Capitalism must therefore always and everywhere fight a battle of annihilation against every historical form of natural economy that it encounters, […]" (Luxemburg 2003: 349).

When capital gains possession of minerals, precious stones and ores, this represents the expropriation of the colonies' natural wealth:

> "The most important of these productive forces is of course the land, its hidden mineral treasure, and its meadows, woods and water, and further the flocks of the primitive shepherd tribes. Since the primitive associations of the natives are the strongest protection for their social organisations and for their material bases of existence, capital must begin by planning for the systematic destruction and annihilation of all the non-capitalist social units which obstruct its development." (Luxemburg 2003: 350)

The relevance of these observations has never been greater, for hidden mineral treasure remains the main prize of imperialism in Africa. Luxemburg (2003: 339) observed that "[t]he economic basis for the production of raw materials is a primitive system of exploitation practiced by European capital in the African colonies and in America, where the institutions of slavery and bondage are combined in various forms." Likewise in his final book, Amin moved from a focus mainly on labour as the basis for value transfer, to natural resources:

> "Capitalist accumulation is founded on the destruction of the bases of all wealth: human beings and their natural environment. It took a wait lasting a century and a half until our environmentalists rediscovered that reality, now become blindingly clear. It is true that historical Marxisms had largely passed an eraser over the analyses advanced by Marx on this subject and taken the point of view of the bourgeoisie – equated to an atemporal 'rational' point of view – in regard to the exploitation of natural resources." (Amin 2018: 86)

How great is this transfer of value? Empirically, there is growing evidence of Africa's net resource extraction losses due to 'natural capital depletion,' far in excess of what are known as the 'Illicit Financial Flows' and even licit flows of profits repatriated by transnational capital (Bond 2018). Luxemburg was concerned about the general extraction process, but it is in the sphere of non-renewable resource depletion that capitalist/non-capitalist power relations most aggressively generate imperialism. Before considering updates of Luxemburg's perspective in Africa, this feature of the natural economy deserves more explanation.

Increasingly sophisticated measurements of natural resource depletion are carried out by the World Bank in its series *The Changing Wealth of Nations*. Therein, Lange et al. (2018) calculate 'Adjusted Net Savings' (ANS) over time, to correct national income accounts, specifically the share of genuine savings within Gross National Income (GNI). The first step in this recalculation is to acknowledge shrinkage of fixed capital (wear and tear), which in Sub-Saharan Africa has been in the range of negative 10-12 percent annually over the past two decades. The second step is to add 'human capital' investments in the form of education expenditure, which in Sub-Saharan Africa has been in the positive 3-5 percent range. The third is measurement of natural capital depletion and fourth is subtraction of economic damage done by pollution, which together range from 8 to 15 percent in Sub-Saharan Africa (mostly resource depletion). The higher the price of resource commodities, such as in the 2008 and 2011 peak 'super-cycle' years, the more the shrinkage of a country's natural wealth. Lange et al. (2018: 47) calculate that nature constitutes 9 percent of world wealth, but in Sub-Saharan African countries it amounts to more than a third of their wealth.

Hence in Africa, it is especially pernicious that the shrinkage of natural wealth is uncompensated for by reinvestment of the profit drawn from that wealth, as a result of multinational corporations (from both the West and BRICS countries) extracting resources but providing the bulk of their returns on investment to overseas shareholders. In contrast, resource-intensive countries – including the likes of Canada, Australia, Norway and much of the Middle East – have a different accumulation process: home-based corporations or state mining or oil companies are responsible for extraction. The revenues from the resources extracted are thus to a much greater extent redistributed, leaving a positive ANS in many resource-rich countries outside Africa.

Applied to Africa, even the most rudimentary ANS analysis is devastating. In one count (World Bank 2014: 14), 88 percent of African countries are net losers from resource extraction once ANS is calculated. Using 1990-2015 data, Lange et al. (2018: 74) conclude that Sub-Saharan Africa loses a net $100 billion of ANS annually, albeit with data limitations: the platinum and diamond sectors, and a few countries with data gaps (including the resource-rich DRC and South Sudan) (Figure 1). If North African, the DRC and Sudan were added, along with the platinum and diamond depletion, it is likely that Africa's annual net loss is $150 billion. As Lange et al. (2018: 82) concede, "Especially for resource-rich countries, the depletion of natural resources is often not compensated for by other investments. The warnings provided by negative ANS in many countries and in the region as a whole should not be ignored."

In aggregate over 1995-2015, some African countries suffered extreme ANS 'dissaving': Angola lost 68 percent, the Republic of the Congo lost 49 percent and Equatorial Guinea lost 39 percent (Lange et al. 2018: 74). Especially in the 2006-10 and 2012-15 years, there were substantial ANS losses in Africa (Figure 1). Subsequently, commodity export values ebbed, along with aid, foreign investment and remittances, leaving most African countries back in their debt traps and growth crises, facing much more active rebellions (Bond 2018).

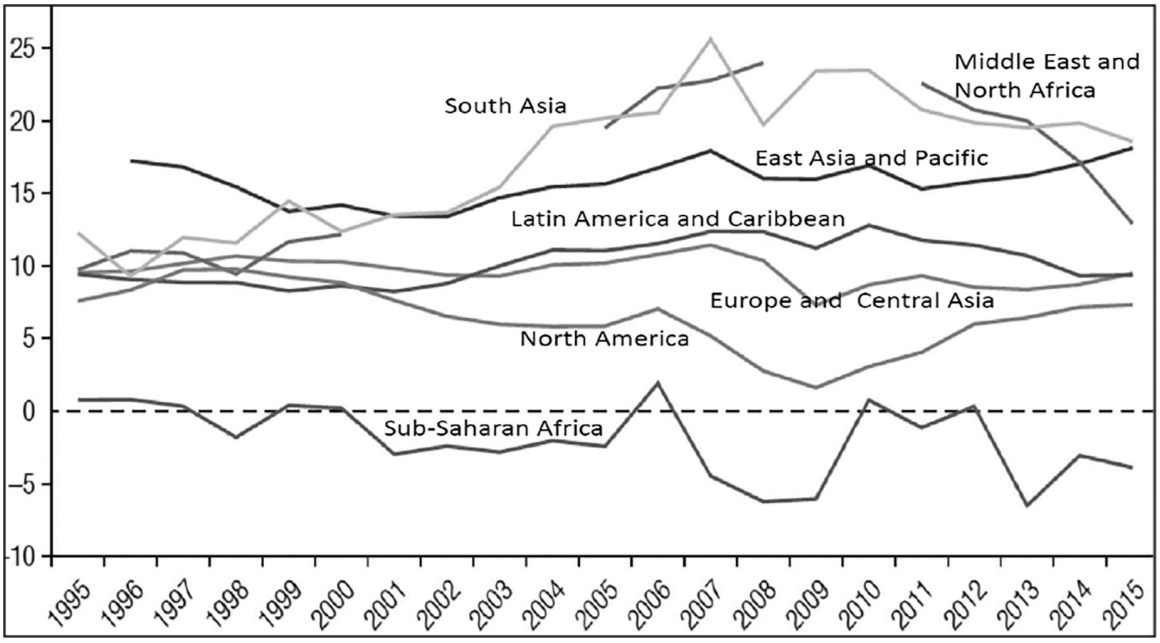

Figure 1: Adjusted Net Savings as percentage of Gross National Income, 1995–2015
Source: Lange et al. 2018: 64.

3. Capitalist crises beget imperialism and *subimperialism* in Africa

Recognising that, as Luxemburg (2003: 327) put it, "Accumulation of capital periodically bursts out in crises and spurs capital on to a continual extension of the market," Samir Amin (2018: 159) took the logic further:

> "How is it that full-fledged industrial capitalism expanded victoriously throughout the 19th century, survived its first systemic crisis of senility during the 20th century, and faces apparently victoriously until this day its second long crisis of senility? The answer cannot be found in the abstract theory of capitalism, but on the ground of the concrete history of its deployment. These two sides of the analysis should not be confused and reduced to one. After Marx himself (for his time) Rosa Luxemburg was the first Marxist thinker who made a serious attempt to answer the question […]
> The fundamental – fatal – contradiction of capitalism resulted into continuous overaccumulation and therefore, faced a problem of outlet for capitalist production. On that ground Luxemburg is certainly right. How this contradiction has

> been overcome in history? Here also Luxemburg is right: capitalism expanded by destroying pre-capitalist modes of production both within the societies of the dominant centers and the dominated peripheries. Handicrafts are replaced by manufacturing industries, small shops by supermarkets etc. This process of accumulation by dispossession still goes on with the current privatization of former public services. Simultaneously these responses of capital to the problem of outlet constitute an efficient counterforce to falling rates of profits."

As Luxemburg (2003: 319) further observed, however, "The solution of one difficulty, however, only adds to another." The solution isn't really a *resolution*. Instead, it is better conceived of as an efficient counterforce that acts merely to displace not resolve the crisis tendencies. And to establish the geographical terrain on which capitalist crisis displacement unfolded a century ago – and still does today – meant Luxemburg had to criticise the geopolitics of a colonialism that fit her theory of imperialism so well.

That geopolitical terrain was carved out in her adopted city of Berlin, at a 77 Wilhelmstrasse mansion where the 'Scramble for Africa' took place in 1884-85. Not a single African was there to negotiate, but indeed that site – today a pub and block of nondescript flats after its post-war demolition – is a central reason why Africa is carved into 54 dysfunctional country units, splitting relatives from each other and imposing colonial-era languages in perpetuity. The Berlin conference's codification of colonial power – mainly held by Britain, France, Portugal, Belgium and Germany – ensured the penetration of capitalist legal systems of property ownership, the settler's monopoly of violence, and the introduction of monetary arrangements. With these capitalist innovations, colonial powers set up pseudo-states in Africa so as to more effectively loot the continent. But Luxemburg's (2003: 447) great innovation was to prove how colonial-imperial accumulation used Africa's natural "economic systems as a medium and soil."

In South Africa, it soon became clear to the world's colonial powers how valuable their conquests could be:

> "British capital revealed its real intentions only after two important events had taken place: the discovery of the Kimberley diamond fields in 1869-70, and the discovery of the gold mines in the Transvaal in 1882-5, which initiated a new epoch in the history of South Africa. Then Cecil Rhodes went into action. Public

> opinion in England rapidly swung over, and the greed for the treasures of South Africa urged the British government on to drastic measures.
> The modest peasant economy was forthwith pushed into the background – the mines, and thus the mining capital, coming to the fore. The policy of the British government veered round abruptly. Great Britain had recognised the Boer Republics by the Sand River Agreement and the Treaty of Bloemfontein in the fifties. Now her political might advanced upon the tiny republic from every side, occupying all neighbouring districts and cutting off all possibility of expansion." (Luxemburg 2003: 394)

The period of the late 1800s in which colonial-imperial power consolidated was also one of a sustained world capitalist crisis, in which the City of London, the Paris financial markets and other financiers marshalled overaccumulated capital, directing its flows into the adventurous investments associated with Rhodes, Belgium's King Leopold II and other larger-than-life accumulators-by-dispossession (Phimister 1992).

If we reconsider the relations between North and South a century later, as did Harvey in *The New Imperialism*, we relearn the relevance of Luxemburg's ideas. Harvey (2003: 185f) both echoes and expands her vision:

> "The opening up of global markets in both commodities and capital created openings for other states to insert themselves into the global economy, first as absorbers but then as producers of surplus capitals. They then became competitors on the world stage. What might be called 'subimperialisms' arose… each developing centre of capital accumulation sought out systematic spatio-temporal fixes for its own surplus capital by defining territorial spheres of influence."

That dynamic, in turn, requires us to think of the way the BRICS – the coordinated network of heads of state and corporations from Brazil, Russia, India, China and South Africa – arose as subimperial allies of world capital's expansionism to "define territorial spheres of influence" (Harvey 2003: 186), especially after the 2008 crisis. Their new physical spaces include neo-colonial land grabs in Africa by voracious investors from India, China, South Africa and Brazil (Ferrando 2013). The gateway to Africa is South Africa – as was oft-repeated at the 2013 BRICS Durban summit and 2018 Johannesburg summit – and is facilitated by territorial

expansion up-continent by Johannesburg capitalists who had been kept (by the apartheid laager) mostly within local boundaries until the early 1990s.

In addition to sources of food and biofuels, BRICS capital is highly engaged in African minerals and petroleum. Anglo American, Glencore and other (now Europe-rebased) manifestations of South African mining capital run roughshod in Africa. For example in 2005, after a Human Rights Watch expose, Anglo admitted working closely with Congolese warlords in a zone where several million people have been killed since the late 1990s. Then there is the $10 billion Lake Albert oil stake by former South African president Jacob Zuma's hapless nephew Khulubuse, working alongside Israel's main extractive-industry tycoon, the notorious Dan Gertler (Bond/Garcia 2015, Bond 2017).

There are just as worrisome tendencies in southern Africa from the other BRICS, e.g.: Vedanta's well-known (and self-confessed) looting of Zambian copper, India's move into Mozambican land expropriation in search of coal (after Rio Tinto's failure) alongside Brazil's giant Vale, China's Anjin working with Zimbabwean generals to loot the Marange diamond fields, and the Russian steel manufacturer Roman Abramovitch's (London-based) parasitical takeover of South Africa's second-largest steel plant (Evraz Highveld) in the same spirit as India's (Luxembourg-based) Lakshmi Mittal, who took over the largest set of steel foundries (Arcelor-Mittal). Both BRICS investors stripped South African assets, without reinvestment, hence leading in 2015 to massive chunks of the continent's main sites of steel capacity being deindustrialised with thousands of job losses. The central cause was cheap Chinese imports due to that country's over-accumulation of several hundred million tons of steel production capacity (Bond 2017). The advertised cooperation between the BRICS sometimes looks, in the harsh light of reality, like cannibalism.

In addition, the expansion is often explicitly subimperial, in the sense of lubricating capitalist relations in non- or less-capitalist geographical territories, often through multilateral power structures. One of the world's most powerful vehicles for this process is the International Monetary Fund (IMF), in which the BRICS have played a greater role since 2015. After donating nearly $100 billion to recapitalising the IMF, four BRICS gained voting share reallocations: China up by 37 percent, Brazil by 23

percent, India by 11 percent and Russia by 8 percent. Yet to accomplish this required that seven African countries lose more than a fifth of their IMF voting share: Nigeria (41 percent), Libya (39 percent), Morocco (27 percent), Gabon (26 percent), Algeria (26 percent), Namibia (26 percent) and even South Africa (21 percent). Africa's suffering in multilateral fora included the 2015 World Trade Organisation summit in Nairobi, in which BRICS members allied with the European Union and U.S. to destroy food sovereignty by agreeing to forego agricultural subsidies (Raghavan 2015), and in the United Nations Framework Convention on Climate Change, in which Africa's interests were sacrificed so that the BRICS, EU and US could arrange the Copenhagen, Durban and Paris deals: there were no binding emissions cuts, accountability systems or recognition of the West's and the BRICS' climate debt (Bond 2016).

Commercial, retail and infrastructural expansion are also vital for penetrating African markets. South African retail capital's takeover of African supermarkets and nascent shopping malls is led by Makro, which is owned by Walmart, a reliable representative of both imperialism's unprecedented concentration of wholesale capital, and its exploitation of the ultra-cheap assembly line. Luxemburg would point out how that line stretches far to the east, into the super-exploitation of China's workers, rural women and environment, and the outsourcing of greenhouse gas emissions. But as the then SA deputy foreign minister Marius Fransman (2012) put it: "Our presence in BRICS would necessitate us to push for Africa's integration into world trade."

The BRICS states' intention here is to aid the extractive industries – especially BRICS firms – in stripping the continent further. Outside South Africa (by far the continent's largest holder of minerals, often estimated in the trillions of dollars), the other main African countries with extensive mining resources were Botswana, Zambia, Ghana, Namibia, Angola, Mali, Guinea, Mauritania, Tanzania and Zimbabwe. Africa's oil and gas producers are, in order of reserves, Nigeria, Angola, Ghana, Gabon, Congo (Republic), Equatorial Guinea, Chad and Uganda. To further extract Africa's raw materials, planning began for a new $93 billion/year Programme for Infrastructure Development in Africa, and the BRICS New Development Bank was launched in 2015 with a view, in part, to provide financing for such mega-infrastructure projects. The first such loan (for $200 million)

was for the expansion of a port-petrochemical complex in Durban, in spite of it encountering strong community opposition (D'Sa/Bond 2018). Many such projects will likely fit into Beijing's territorially-ambitious Belt and Road Initiative.

All of this is reminiscent of the ways colonial-backed capital penetrated the African continent, and resistance rose, as Luxemburg (2003: 447) described it in South Africa:

> "The ultimate purpose of the British government was clear: long in advance it was preparing for land robbery on a grand scale, using the native chieftains themselves as tools. But in the beginning it was content with the 'pacification' of the Negroes by extensive military actions. Up to 1879 were fought nine bloody Kaffir wars to break the resistance of the Bantus. The more ruthlessly capital sets about the destruction of non-capitalist strata at home and in the outside world, the more it lowers the standard of living for the workers as a whole, the greater also is the change in the day-to-day history of capital. It becomes a string of political and social disasters and convulsions, and under these conditions, punctuated by periodical economic catastrophes or crises, accumulation can go on no longer."

4. Capitalist contradictions, subimperial ambitions and violence

The geopolitical and military tensions between subimperial South Africa and Africa (as a whole) began to heighten just as world commodity prices began to crash. From 2011-15, the slowing rate of Chinese growth and overproduction tendencies meant the decline of major mineral prices by more than 50 percent. In South Africa's case, the collapse of coal and platinum prices by more than half was devastating to the share values of major firms with local operations – Lonmin, AngloPlats and Glencore – whose net worth quickly plummeted by more than 85 percent (indeed by 99 percent in Lonmin's case, leading to the firm's demise and takeover in 2017). It is in this context of crisis plus super-exploitative relations between capitalist and non-capitalist spheres that the Luxemburgist theory of imperialism finds confirmation in contemporary Africa. In 2013, WikiLeaks published emails hacked by Jeremy Hammond from the files of Stratfor

(known as the private-sector version of the Central Intelligence Agency), which quite correctly summed up the situation in the region as follows:

> "South Africa's history is driven by the interplay of competition and cohabitation between domestic and foreign interests exploiting the country's mineral resources. Despite being led by a democratically-elected government, the core imperatives of SA remain maintenance of a liberal regime that permits the free flow of labor and capital to and from the southern Africa region, and maintenance of a superior security capability able to project into south-central Africa." (Stratfor 2009)

The democratically-elected government of the African National Congress (ANC) explicitly calls itself 'anti-imperialist', and yet in 2013, a century after Luxemburg explained the inner necessity of imperialism to turn to violence in search of extra-economic wealth (capitalist versus non-capitalist looting), a small but revealing example emerged in the Central African Republic (CAR). There, President Francois Bozize's special advisor Didier Pereira had partnered with 'ANC hard man' Joshua Nxumalo and the ANC's funding arm, Chancellor House, to establish a diamond export monopoly. According to *Mail&Guardian* newspaper investigators AmaBhungane (2013), "Pereira is currently partnered to the ANC security supremo and fundraiser, Paul Langa, and former spy chief Billy Masetlha."

The result was that both Presidents Thabo Mbeki and Jacob Zuma deployed troops to first support Bozize at the presidential palace, and after he fled, to protect Johannesburg firms' operations in the CAR capital of Bangui. But the city was over-run by rebels on the weekend prior to the BRICS summit in Durban, and tragically, 15 of the 220 South African National Defence Force (SANDF) troops involved in a massive fire fight against the rebels lost their lives in Bangui, and were returned home in coffins just as the BRICS leaders also flew in. The incident very visibly demonstrated the limits of South Africa's "superior security capability to project into south-central Africa" (Stratfor 2009).

But SANDF wasn't alone in striving – even if failing – to serve capital's most excessive interests. For seven months before, in mid-August 2012, the local South African Police Service (SAPS) gained international notoriety for the massacre of 34 wildcat-striking Lonmin platinum mineworkers at

Marikana. The police were called in via emails from Cyril Ramaphosa, the owner of 9 percent of Lonmin. He was the former mineworker leader in the late 1980s whose national strike breakthrough shook apartheid. Ramaphosa soon became a black billionaire capitalist and remained so close to the ANC elites – becoming deputy president of the ruling party in late 2012 and the country's deputy president in 2014 – that he carelessly told the police minister he wanted a "pointed response" to the "dastardly criminal" mineworkers, in an email on 15 August 2012. Within 24 hours, the police committed the Marikana Massacre (Farlam Commission 2015).

As Luxemburg (2003: 351) had predicted,

> "The method of violence, then, is the immediate consequence of the clash between capitalism and the organisations of a natural economy which would restrict accumulation. Their means of production and their labour power no less than their demand for surplus products is necessary to capitalism. Yet the latter is fully determined to undermine their independence as social units, in order to gain possession of their means of production and labour power and to convert them into commodity buyers."

5. The necessity of resistance, solidarity and ideology

At this point, the South African working class and other activists in the 'natural economy' – e.g. women opposed to mining extraction (Womin 2018) – were fed up with the displacement of capitalist crisis tendencies into their households. By the 2010s, the South African worker suffered lower wages relative to capital's profits (by more than 5 percent compared to 1994); rising inequality, up to an exceptionally high "market income Gini Coefficient" of 0.77 (World Bank 2014); extreme poverty, rising to 63 percent of the population by 2011 (Budlender et al. 2015); and soaring financial obligations. The latter were important, insofar as deregulated loan-sharks had moved en masse to the Marikana platinum fields to find borrowers. The mineworkers soon had so many loan repayments stripping their income that, by 2012, they became absolutely desperate. Left with little in their monthly pay-checks, they insisted on a $1000/month wage (i.e., double the existing payment), since the lenders' 'emolument

attachment orders' reduced their take-home pay to virtually nothing. Even after the massacre, the workers stayed atop the hillside in their thousands, on strike for a full month to win the $1000/month, and in 2014 more than 70,000 workers struck for five months across all the other platinum fields, before winning their salary demand, but at the expense of enormous misery and fury (Saul/Bond 2014).

It was all too reminiscent of Luxemburg's description of the same terrain a century earlier:

> "The more ruthlessly capital sets about the destruction of non-capitalist strata at home and in the outside world, the more it lowers the standard of living for the workers as a whole, the greater also is the change in the day-to-day history of capital. It becomes a string of political and social disasters and convulsions, and under these conditions, punctuated by periodical economic catastrophes or crises, accumulation can go on no longer. But even before this natural economic impasse of capital's own creating is properly reached it becomes a necessity for the international working class to revolt against the rule of capital." (Luxemburg 2003: 447)

The necessity is felt in many African class struggles. The African working class is angrier than any other continent's, according to the World Economic Forum (2017) whose Global Competitiveness Index each year measures 'employer-labor cooperation.' Since 2012, the South African proletariat has had the leading position as the world's least cooperative working class (in 2011 the class was ranked 7th, reflecting the intensification of struggles such as Marikana). The 32 African countries included in the survey are by far the most militant of the 138 sites surveyed annually, for of these, 28 African proletariats score above the world median of militancy, and just four below. Of the most militant 30 countries' workforces in 2017, a dozen were African: South Africa (on a scale of 1 as most militant to 7 as least, scoring 2.5 in 2017) followed by Chad (3.5), Tunisia (3.6), Liberia (3.7), Mozambique (3.7), Morocco (3.7), Lesotho (3.7), Ethiopia (3.8), Tanzania (3.8), Algeria (3.8), Burundi (3.8), and Zimbabwe (4.0).

Communities are also engaged in unrest, especially in areas of resource extraction. In South Africa, the number of 'violent' demonstrations – mostly 'service delivery protests' recorded by the police – soared

from fewer than 600 per year in 2002-04 to nearly quadruple that number by 2014 (Alexander et al 2018). As the case of Burkina Faso suggests – what with its popular 2014 overthrow of Blaise Compaoré and his subsequent in-exile prosecution for the murder of the great African Marxist revolutionary Thomas Sankara in 1987 – the anger occasionally boils over into local and national revolts. The tempo of revolt is apparently increasing, especially since the peak and then fall of commodity prices in 2011 (Figure 2). Protests have begun to exhibit patterns so stark they were even recognised in the African Development Bank et al.'s (2017: 135) annual *African Economic Outlook* (AEO) chapter on Governance. The 2017 AEO found that after protests over wages and salaries, "Dissatisfaction with political arrangements was among the main drivers of public protests in Africa from 2011 to 2016. The majority of these protests called for more accountability and justice in the public management systems and for fairer elections. This is an indication of demand for higher standards of integrity within public institutions."

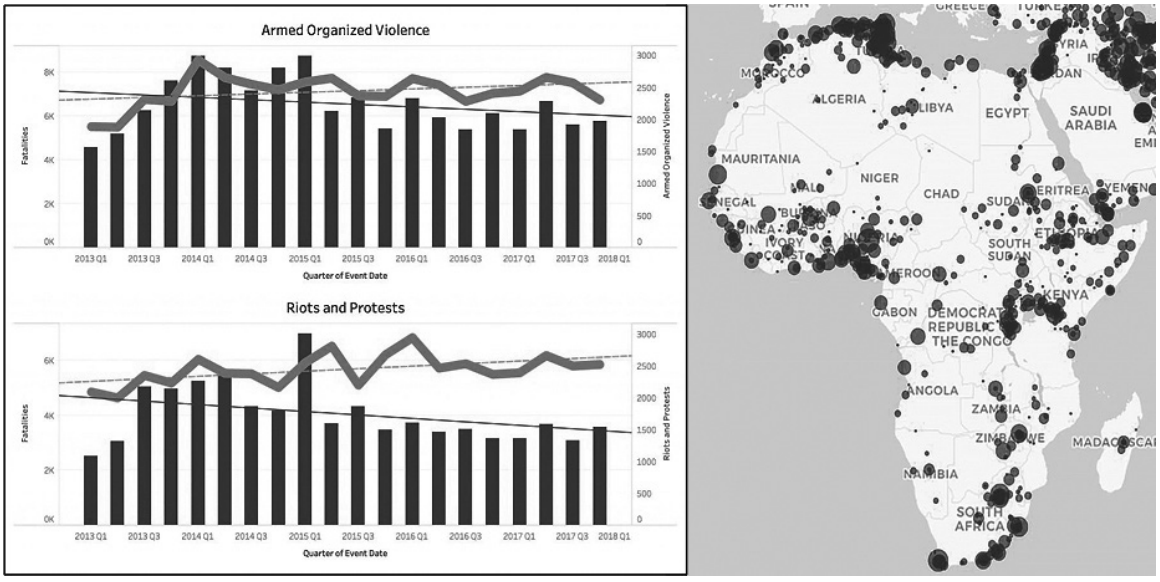

Figure 2: Africa's uprising: Number of 'armed organised violence' (mainly by states) and fatalities (2014-18), and locations of 'riots and protests', 2007-18

Source: Armed Conflict Location & Event Data Project (2018). Conflict Trends. http://www.acleddata.com/

Socio-economic grievances were evident in many of the uprisings. Indeed, the rise and contagion of generalised protests since 2011 (Figure 2) is remarkable. There were always major outbursts, and in some countries – Zambia (2001), Malawi (2002), Gabon (2003), Nigeria (2006), Cameroon (2008), Niger (2009) – they had a major impact on politics. But notably in 2011, the protest wave did not simply crest, briefly, as a result of North African turmoil, and then fall. The Tunisian, Egyptian and Libyan uprisings caught the world's attention, but only Tunisia's outcome generated democracy and even then the next stage of socio-economic unrest began in 2018, as neoliberalism failed the country. Many protests subsequently led to such strong pressure against national power structures that just as with the once-invincible Ben Ali, Mubarak and Gaddafi regimes, long-serving leaders were compelled to leave office.

Nevertheless, higher levels of African protests persisted, moving across the continent (Brandes/Engels 2011, Ekine 2011, Manji/Ekine 2012, Dwyer/Zeilig 2012, Biney 2013, Mampilly 2013, Branch/Mampilly 2015, Wengraf 2018). The pressure was maintained in particular sites, including Senegal (2012), Burkina Faso (2014), Burundi (2015), Rwanda (2015), Congo-Brazzaville (2016), and DR Congo (2016). In 2017-18, leaders backed by similarly formidable state and political party apparatuses as enjoyed by Zuma (South Africa), Desalegn (Ethiopia) and Mugabe (Zimbabwe) fell surprisingly rapidly, in part due to mass uprisings with tens of thousands protesters massing in national capitals and other major cities, many of whom were furious about resource depletion and looted state funds.

Other protests which have recently reflected strong community pressure on their governments include Togo (against the dictator Faure Gnassingbé), the Democratic Republic of the Congo (against Laurent Kabila), Cameroon (mainly against Paul Biya, some of which demanded Anglophone-Cameroonian independence), Somalia (against Islamic extremism), Morocco (against corruption and unemployment), Libya (against slave markets), Uganda (against Yoseri Museveni's overturning of term limits) and Kenya (against Uhuru Kenyatta's dubious election). In The Gambia, protests against Yahya Jammeh succeeded in ensuring the integrity of a December 2016 election, which the long-serving dictator lost.

Local opposition aimed at blocking mining and petroleum extraction has the potential to become far more effective. In 2015, Anglo American's

CEO expressed concerned about the "$25 billion worth of projects tied up or stopped" across the world (Kayakiran/Van Vuuren 2015). According to the Johannesburg faith-based mining watchdog Bench Marks Foundation (2018: 2) at the 2018 Alternative Mining Indaba, "Intractable conflicts of interest prevail with ongoing interruptions to mining operations. Resistance to mining operations is steadily on the increase along with the associated conflict."

If we take these signs of dissent seriously, it is not only the removal of corrupt, unpatriotic regimes that is needed, though that is a pre-condition. What now urgently needs discussing in many settings, in the spirit of Luxemburg, is the replacement of neo-colonial African compradors and the corporations they serve, with a political party and programme of popular empowerment. An egalitarian economic argument will be increasingly easier to make now that world capitalism and the dynamics of deglobalisation are forcing Africa towards rebalancing. This will ultimately compel discussion of much more courageous economic policies, potentially including:

- in the short term, as currency and debt repayment crises hit, reimposing exchange controls will ensure control of financial flows, quickly followed by lowered interest rates to boost growth, with an audit of 'Odious Debt' before any further repayment of scarce hard currency, along with much better management of imports – to serve national interests, not the interests of elite consumers;
- as soon as possible, the adoption of an ecologically sensitive industrial policy aimed at import substitution (making things locally), sectoral re-balancing, meeting social needs and true sustainability;
- once finances are secure, it will be possible to dramatically increase state social spending, paid for by higher corporate taxes, cross-subsidisation and more domestic borrowing (and a looser money supply – known in the West as 'Quantitative Easing' – if necessary, so long as it does not become hyper-inflationary);
- the medium- and longer-term economic development strategies will reorient infrastructure to meet unmet basic needs, by expanding, maintaining and improving the energy grid, plus water and sanitation, public transport, clinics, schools, recreational facilities and universal access to the internet; and

- in places like South Africa and Nigeria that have an excess reliance on extraction and burning of fossil fuels, it will be vital to adopt what have been termed 'Million Climate Jobs' strategies to generate employment for a genuinely green 'Just Transition'.

These are the kinds of approaches requiring what the continent's greatest political economist, Amin (1990), long ago termed 'delinking' from global capitalism's most destructive circuits. He stressed that this is not a formula for autarchy, and certainly would gain nothing from North Korean-type isolation. But it would entail a sensible approach to keeping G20 states and corporations at bay as much as possible, while tapping into even more potentials for transformation.

The crash of oil and mineral prices starting in 2011 confirms that the commodity super-cycle and the era of 'Africa Rising' rhetoric is now decisively over. The period ahead will perhaps be known as Africans Uprising against Africa Rising. Looking at this continent a century ago, Luxemburg (2003: 394) found instances of non-capitalist, anti-capitalist resistance, just as the German government began its genocide of the Herero people of Namibia. From North Africa to South Africa, colonialism ran into trouble.

The same bloody wars are being fought against African uprisings. What was missing a century ago, and still is today, is a coordinated strategy so that when revolt rises as the capitalist system meets non-capitalist societies and nature in Africa, the resistance can be stronger and sturdier – and become genuinely anti-capitalist – than we have experienced to date. The anti-colonial but resolutely nationalist politics which Frantz Fanon warned about – when writing of what he termed the 'Pitfalls of National Consciousness' exhibited by petit-bourgeois leaders – still prevail, and a genuinely radical pan-African anti-capitalism is still to be widely articulated. As Fanon (1967) put it in *Toward the African Revolution*, "the deeper I enter into the cultures and the political circles, the surer I am that the great danger that threatens Africa is the absence of ideology." In his speech "The Weapon of Theory," Amilcar Cabral (1966) agreed: "The ideological deficiency within the national liberation movements, not to say the total lack of ideology – reflecting as this does an ignorance of the historical reality which these movements claim to transform – makes for one of the

greatest weaknesses in our struggle against imperialism, if not the greatest weakness of all."

Luxemburg points the way forward on ideology, flowing directly from the various experiences of proletarian and pre-proletarian uprisings that she so carefully observed – at a distance from Africa but with the most solidaristic concern – and that she organised in Europe until her 1919 murder, six years after writing these words to conclude *The Accumulation of Capital*:

> "Even before this natural economic impasse of capital's own creating is properly reached it becomes a necessity for the international working class to revolt against the rule of capital. Capitalism is the first mode of economy with the weapon of propaganda, a mode which tends to engulf the entire globe and to stamp out all other economies, tolerating no rival at its side. Yet at the same time it is also the first mode of economy which is unable to exist by itself, which needs other economic systems as a medium and soil. Although it strives to become universal, and, indeed, on account of this its tendency, it must break down-because it is immanently incapable of becoming a universal form of production. In its living history it is a contradiction in itself, and its movement of accumulation provides a solution to the conflict and aggravates it at the same time. At a certain stage of development there will be no other way out than the application of socialist principles. The aim of socialism is not accumulation but the satisfaction of toiling humanity's wants by developing the productive forces of the entire globe. And so we find that socialism is by its very nature a harmonious and universal system of economy." (Luxemburg 2003: 447)

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Abstract *Rosa Luxemburg lieferte mit Akkumulation des Kapitals als erste marxistische Ökonomin einen für Afrika relevanten Zugang zu den Strukturkategorien Klasse, ‚Rasse' und Geschlecht sowie zum Verhältnis Natur-Gesellschaft und zu regional definierten Unterdrückungsverhältnissen. In ihrer Beschäftigung mit der Theorie und Praxis des Verhältnisses zwischen kapitalistischen und nichtkapitalistischen Sphären, die die westliche multinationale, kommerzielle Extraktion und darüber hinaus die Politik von Firmen aus sogenannten ‚emerging economies' heute bestimmen, war sie ihrer Zeit weit voraus. Der vorliegende Artikel argumentiert, dass in Luxemburg'scher Tradition zwei Analysebereiche besondere Aufmerksamkeit seitens der kritischen Entwicklungsforschung verdienen: ein erweitertes Verständnis der – auf Raubbau basierenden –Werttransfers aus Afrika sowie die Beschäftigung mit Kollaborationen zwischen imperialen und subimperialen nationalen Mächten (und Machtblöcken), die Afrikas Armut mitverantworten. Anhand dieser zwei wiederbelebten Forschungsbereiche lassen sich zahlreiche Aspekte aus Luxemburgs Akkumulation des Kapitals nennen, die bis heute nicht an Relevanz für das Verständnis der gegenwärtige Situation in Afrika verloren haben: das Verhältnis zwischen kapitalistischen und nichtkapitalistischen Sphären, der Werttransfer natürlicher Ressourcen, kapitalistische Krisentendenzen und Verdrängungen, Imperialismus damals und Imperialismus/Subimperialismus heute sowie die notwendige Weiterentwicklung unterschiedlicher Protestformen zu einer – von sozialistischer Weltanschauung getragenen – Solidarität.*

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Felix Wemheuer (Hg.): Marx und der globale Süden. Neue Kleine Bibliothek 227. Köln: PapyRossa Verlag 2016, 326 Seiten, 19,90 Euro.

Während der letzten beiden Jahrzehnte hat die postkoloniale Theorie den Marxismus als Grundlage der mainstreamkritischen Forschung an vielen Universitäten verdrängt. Diese Beobachtung lieferte den Anstoß für den Sammelband *Marx und der globale Süden*, der sich kritisch mit dieser Entwicklung auseinandersetzt. Die postkoloniale Kritik am Marxismus, so Herausgeber Felix Wemheuer in der Einleitung, habe „zu Recht Schwachstellen bei Marx aufgezeigt", darunter insbesondere das fehlende Verständnis für den Zusammenhang von Klassen- und Geschlechterverhältnissen sowie die Bedeutung rassistischer Zuschreibungen (S. 24). Nichtsdestoweniger sei es aber notwendig, marxistische Perspektiven gerade in Bezug auf den globalen Süden wieder stärker zu diskutieren, um „die Welt als Ganzes zu verstehen und nicht in unendlichen, unvergleichbaren Partikularitäten und Fragmenten scheinbar aufzulösen" (S. 29).

Der Band gliedert sich in drei Teile. Im ersten Teil werden postkoloniale Ansätze (bzw. deren Kritik am Marxismus) aus marxistischer Perspektive kritisiert. Mit theoretischen Argumenten antwortet Vivek Chibber auf den Vorwurf der *Subaltern Studies* (insbesondere ihrer Vertreter Dipesh Chakrabarty und Ranajit Guha), der Marxismus habe wie der Liberalismus mit universalisierenden Konzepten dem Eurozentrismus Vorschub geleistet. Dieser These entgegnet Chibber, dass sich der Kapitalismus zwar weltweit ungleich durchgesetzt und entwickelt habe, aber für AkteurInnen global strukturell ähnliche ökonomische Restriktionen gelten würden. In seiner Ausbreitung unterwerfe der Kapitalismus die kulturell und religiös heterogenen ArbeiterInnen seiner Logik und provoziere Widerstand, der jedoch unterschiedlich ausfalle. Universalisierende Konzepte, wie sie seitens marxistischer TheoretikerInnen vertreten werden, seien deshalb mit Einschränkungen zulässig – erst sie ermöglichten ein kritisches Verständnis von Kapitalismus, Krisen und Widerstand. Kevin Anderson antwortet auf die Kritik postkolonialer TheoretikerInnen wie Edward Said, die Karl Marx für sein unilineares, teleo-

logisches und eurozentrisches Entwicklungsmodell verurteilten und ihm mangelnde Aufmerksamkeit für Rassismus und Kolonialismus unterstellten. Wie Anderson nachweist, verfolgte Marx in seinen späten Studien zu Indien und China „einen eher multilinearen und multikulturellen Ansatz zum Verständnis dieser Regionen“ (S. 36) und bestritt ganz explizit, „eine ‚geschichtsphilosophische Theorie des allgemeinen Entwicklungsganges […], der allen Völkern schicksalsmäßig vorgegeben ist‘, vorgelegt zu haben“ (S. 48). Die Spätschriften seien weit von jeglichem abstrakten Universalismus entfernt und enthielten auch Ausführungen zu indigenen Widerstandsformen sowie zahlreiche originelle Ideen zu Nationalität und Ethnizität.

Der zweite Teil fragt nach Nutzen und Erweiterung von marxistischem Handwerkszeug für globalgeschichtliche Fragestellungen. Michael Zeuske argumentiert, dass Marx „Massensklavereikomplexe“ fälschlich als rückständig gesehen habe, während diese aber funktional wichtig waren. Sie stellten die Ergänzung zur freien Lohnarbeit dar, die dem globalen Norden seine blühende wirtschaftliche Entwicklung ermöglichte. David Mayer wirft in seinem Beitrag die Frage auf, inwiefern es nicht nur einen Marxismus *in* Lateinamerika, sondern auch einen Marxismus aus Lateinamerika gab, dessen Debatten eine eigenständige Dynamik besaßen, aber anhand von universellen analytischen Kategorien – angepasst an die historischen und regionalen Besonderheiten – geführt wurden. Jörg Goldberg diskutiert die Variationen kapitalistischer Gesellschaftsformationen in aufsteigenden Ländern des globalen Südens. Als Nachzügler auf dem westlich dominierten Weltmarkt seien die Herrschaftsverhältnisse vor Ort von deren besonderem Entwicklungsweg geprägt.

Im dritten Teil werden drei aufsteigende Schwellenländer – China, Indien und Südafrika – in Hinblick auf unterschiedliche Fragestellungen untersucht. Felix Wemheuer diskutiert in seinem Beitrag, wie in der Volksrepublik China zwischen 1949 und 1980 der Klassenstatus definiert wurde und welche Funktion das System der Klassifizierung erfüllte. Der Klassenkampf in China äußerte sich in dieser Phase vornehmlich in Verteilungskämpfen um Macht und soziales Kapital, die sich um die Aufrechterhaltung bzw. Ände-

rung der durch das Statussystem garantierten Ordnung drehten. Mit dem Marxismus in China nach Mao beschäftigt sich Josef Gregory Mahoney. Er stellt fest, dass der Marxismus noch erstaunlich präsent, aber keinesfalls so explizit wie früher sei. Viele ChinesInnen verfügten über ein historisch-materialistisches Entwicklungsverständnis, die gegenwärtige Bedeutung des Klassenkampfes sei aber umstritten. Mit Bezug auf Indien kritisiert Christian Strümpell die Diagnose des indischen Historikers Partha Chatterjees, dass aktuell ein Prozess ursprünglicher Akkumulation zu beobachten sei. Die bäuerliche Bevölkerung sei bereits vor der Trennung von ihrem Land in kapitalistische Produktionsweisen eingebunden gewesen. Am Beispiel Rourkelas belegt Strümpell, dass Akkumulation durch Enteignung nicht nur Land, sondern auch Arbeit betrifft und sich nicht auf den ländlichen Raum beschränkt. Reinhart Kößler widmet sich der Bedeutung der Kategorien „Klasse" und „Proletariat" für die Analyse sozialer Kämpfe im heutigen Südafrika. Zwar gebe es formelle Arbeitsverhältnisse, die „entscheidende Schubkraft der Bewegungen der letzten Jahre kam aber von außerhalb dieses formal weitgehend nach den Konventionen der klassischen Arbeiterbewegung organisierten Bereichs" (S. 321). In soziale Kämpfe seien immer auch andere Schichten einbezogen gewesen, die konzeptionell nicht als nachgeordnete BündnispartnerInnen der ArbeiterInnenklasse gefasst werden könnten. Statt der Wiederbelebung des Konzepts einer globalen Klasse von ArbeiterInnen brauche es also weitere Debatten, um gegenwärtige Transformationen fassbar zu machen.

Die Beitragenden, von denen fast alle aus dem globalen Norden stammen, verdeutlichen, wie marxistische Theorien im globalen Süden unterschiedlich aufgegriffen, adaptiert und transformiert wurden. Sie zeigen damit auch, dass es nicht einen Marxismus des globalen Nordens gibt, der den anderen Marxismen überlegen wäre. Mit theoretischen Argumenten und empirischen Befunden leistet *Marx und der globale Süden* einen wertvollen Beitrag zur Rehabilitierung von den mancherorts stark marginalisierten marxistischen Forschungszugängen und verdeutlicht deren Wichtigkeit für die Analyse aktueller Prozesse und Machtverhältnisse. Das gilt insbesondere, wenn sie berechtigte postkoloniale Kritiken an Schwach-

stellen marxistischer Traditionen an Bord nehmen, statt sich nur gegenseitig aneinander abzuarbeiten – in dem Fall gibt es nämlich mit dem „Mainstream“, von dem sich VertreterInnen beider Strömungen abgrenzen, einen lachenden Dritten.

Julia Eder / Eric Burton

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