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## **Freeing Uneven and Combined Development from the Whip of External Necessity: Toward a Synthesis with Dussel's Liberation Philosophy**

Aslak-Antti Oksanen

University of Bristol

antti.oksanen@bristol.ac.uk

### **Abstract**

This article argues that while uneven and combined development (U&CD) scholars have made great contributions to theorising the causal implications of societal multiplicity, the overtly normative contributions of U&CD scholarship remain thin. To address this gap, I propose a synthesis between U&CD and Enrique Dussel's normatively oriented liberation philosophy. To enable this, U&CD must be stripped of its more causally oriented concepts, like the 'whip of external' necessity, which constrains the scope of normative analysis by confining it to sovereign states. Incorporating Dussel's liberation philosophy and its concept of exteriority into U&CD's social ontology enables seeing beyond the states-system and allows for the inclusion of stateless peoples as entities and agents of global politics. This is demonstrated by applying the combined conceptual framework to the Chiapas Zapatista movement's relation to the Mexican state.

## Introduction

The adaptation of Trotsky's idea of uneven and combined development (U&CD) as a theoretical approach to International Relations (IR) has contributed greatly to a reimagining of the discipline. Indeed, this novel application has shifted focus away from realism's negative definition of the 'international' (as characterised by the absence of a central authority), towards an explication of the 'international' as characterised by societal multiplicity (Rosenberg 2016, 136). While U&CD scholars have made significant contributions to developing conceptual means for theorising the unique consequences of societal multiplicity, these contributions have predominantly been on the side of causal theory. In turn, the normative side of U&CD has remained underdeveloped.

More often implied as normative rather than explicitly stated as such, the normative contributions of U&CD scholars have typically concerned anti-Eurocentrism. Even still, U&CD scholars have approached this normative problem in causal terms, as they see causally flawed representation of Europe's transition to modernity as the foundation of Eurocentric ideology. For these scholars, discrediting Eurocentric historiography is the key to defeating ideological Eurocentrism (Matin 2013b, 370; Anievas and Nişancıoğlu 2013, 101; 2015, 40).

Other than anti-Eurocentrism, the explicitly normative contents of current U&CD IR scholarship is rather thin, with Antunes de Oliveira's (2019) recent intervention standing out as an exception. By posing the overtly normative question of 'development for whom?', de Oliveira (2019) stresses that development is not an autonomous process; but rather an ethical choice—and should be treated as such. In de Oliveira's view, we ought to abandon aggregated and linear conceptions of development, as the important question is the distribution of the relative gains and losses of development across different groups. Further, de Oliveira (2019) argues that U&CD enables answering the ethically driven question of 'development for whom?', by providing the theoretical means for a nonlinear, disaggregated conception of social development, by highlighting its multilinear uneven trajectories.

My argument is that while U&CD has valuable conceptual resources for addressing the question of 'development for whom?', the heavy emphasis on causal analysis in the current IR iteration of U&CD limits the ability of these resources to provide varied, ethically informed answers to de Oliveira's query. Current IR adaptations of U&CD are optimised for analysing the effects of uneven power distribution on interactive societal development through the concept of the 'whip of external necessity' (Rosenberg 2013, 195-198). While the 'whip' has clear utility in theorising inter-state politics, it also limits the analytical scope of U&CD. By implying that the 'intersocietal' consist only of societies that succeed in preserving their external independence, the 'whip of external necessity' reduces the 'intersocietal' to the 'inter-state' in the age of the modern state-system. This reduction leaves systematic, ethically informed analysis of the developmental trajectories of societies subordinated by states outside the analytical scope of these U&CD adaptations.

Therefore, an alternative, normatively oriented adaptation of U&CD is needed. To this end, I propose a more limited U&CD adaptation—stripped of the 'whip of external necessity' and related concepts—to enable a broader conception of the 'intersocietal' beyond states. To equip this adaptation of U&CD with

suitable normatively oriented concepts, I suggest a synthesis with Enrique Dussel's liberation philosophy (LP). LP's concept of 'exteriority' draws attention to groups marginalised by the dominant political and economic structures (Dussel 1985, 41; 2013, 298-299), which enables a conception of the intersocietal that incorporates stateless peoples as suppressed exterior societies. I aim to use U&CD and LP in complimentary ways, relying on U&CD for illuminating the intersocietal's dominant structures, like the states-system and global capitalism, and to remain attentive to the constitutive effects intersocietal interactions have on all societies, while using LP to remind of the presence of exterior societies and economic systems subordinated by the dominant structures. Dussel's (2008, 80; 2013, 278) LP also provides formal ethical criteria, that draw attention to the plight of disadvantaged exterior groups and enable systematic ethical evaluation of their lived experience and political aspirations. The utility of this combined analytical framework is demonstrated through its application to the case of the Mexican Chiapas Zapatista uprising, which is an example of suppressed international relations between a dominant and exterior totality of the intersocietal.

This article is structured into four sections. The first contextualises this intervention in relation to existing U&CD scholarship, while the second introduces Dussel's LP. The third section outlines a preliminary synthesis of U&CD and LP, and the final section applies this synthesis to the case of the Zapatista uprising in Chiapas, Mexico.

### **The normative limitations of current IR adaptations of uneven and combined development**

The adaptation of U&CD to IR has sparked a lively debate about what the object domain of the discipline of IR ought to be (Kurki and Rosenberg 2020). Justin Rosenberg (2016, 136), who pioneered adapting U&CD to IR, has suggested replacing realism's negative definition of the 'international'—through the absence of an overarching authority—with a positive definition of societal multiplicity as the defining trait of the 'international'. U&CD scholars have made great strides in analysing the unique causal consequences that arise from societal multiplicity through a rich output of theoretical and applied empirical works. However, the normative side of IR U&CD remains underdeveloped.

The normative-political contributions of the current wave of U&CD IR scholarship have been implied more than explicitly declared. The U&CD scholars' most unambiguous normative stance has been opposition to Eurocentrism, expressed through an effort to systematically expose the fallacies of Eurocentric historiography and ideology. The U&CD scholars see these two as intertwined, as Eurocentric representations of history provide the 'evidence' that supports Eurocentric ideology. This is apparent in the U&CD scholars' definition of Eurocentrism as originating from neglect of the intersocietal dimension of causality. This disregard, U&CD scholars maintain, has allowed for the perpetuation of myths of Europe's autonomously enacted transition to modernity due to its ostensibly unique qualities. In turn, this historical misconception generates the following ideologically Eurocentric beliefs: that Europe represents a superior civilization and that it is entitled to intervene in other societies to help them replicate Europe's

developmental path—which is seen as historically and normatively progressive (Anievas & Nişancıoğlu 2013, 79-82; 2015, 4-5; Matin 2013a, 2).

U&CD overdetermines Eurocentrism thus defined through its core theoretical assumptions: namely that there are multiple socioeconomically and culturally uneven societies, which generate further unevenness through their interactions. Given that interaction among societies enables cross-appropriation of practices that could not have emerged endogenously, no society's development is internal. Indeed, this rules out the possibility of Europe having transitioned to modernity autonomously. Furthermore, as societies appropriate practices from one another, they become combined social formations of organic and imported practices. The societies' resultant developmental paths are unique and multilinear, eliminating the possibility of their convergence around a homogenous state of modernity. These theoretical insights both discredit the notion that other societies could or should try to replicate Europe's developmental path and destigmatise the unique development paths of non-Western societies by normalising multilinear development paths (Matin 2013b, 370; Anievas and Nişancıoğlu 2013, 101; 2015, 40).

Apart from anti-Eurocentrism, there is a very limited range of overly normative content in the current wave of U&CD IR scholarship. Anievas and Nişancıoğlu (2015, 278-282) have drawn out the rather vague implication that anti-capitalist politics must follow many strategies to effectively contest the various forms of oppression that are endemic to combined forms of capitalism. Rosenberg (2020) recently provided highly insightful U&CD-informed reflections on the failure of Trotsky's strategy of permanent revolution and its implications for revolutionary politics. Despite these contributions, the overly normative aspect of U&CD's IR adaptations remains underdeveloped, as some U&CD scholars have admitted (Anievas and Matin 2016b, 254).

However, a recent contribution to the U&CD debate by de Oliveira (2019) stands out as a clear normative intervention. His article, titled 'Development for whom?', focuses on the ambiguous role of the concept of 'development'. On the one hand, 'development' has frequently been invoked to justify questionable politics, expressive of the forms of Eurocentrism referenced above (de Oliveira 2019). On the other hand, 'development' at once expresses the legitimate desire for a better life through increased prosperity and enables a systematic understanding of the process of material transformations. The latter is essential for informing counter-hegemonic struggles. de Oliveira (2019) argues that U&CD offers an interactive multilinear conception of development, which breaks from Eurocentric dichotomous distinctions between underdevelopment/development and unidirectional roadmaps between them. U&CD also provides a more realistic and normatively useful understanding of material change—one that sees material change as differentiated within and across societies—and does not conflate development with growth. This enables conceptualising development as a process of material change, involving gains and losses for different groups that must be seen from their varied perspectives (de Oliveira 2019).

While de Oliveira's intervention highlights U&CD's strengths, it also inadvertently exposes some limitations of current IR adaptations of U&CD. The U&CD scholars whose work de Oliveira (2019) references include Rosenberg, Kamran Matin, Alexander Anievas and Kerem Nişancıoğlu. I will argue that

their adaptations of U&CD operate with growth-oriented conceptions of development. Moreover, because these scholars' works focus on theorising the causal implications of societal multiplicity, their auxiliary concepts make their analyses slanted toward the perspectives of states. As states have been the most powerful entities of the 'intersocietal' for some time, they rightly occupy a prominent position in their causal analyses. However, optimisation for causal analysis of intersocietal interaction also constrains these U&CD adaptations' capacity for providing varied and normatively informed answers to the question of 'development for whom?'

The core explanatory concepts of the current IR adaptations of U&CD include the 'whip of external necessity' (henceforth the 'whip'), the 'privilege of backwardness' (henceforth the 'privilege') and societal 'combination' (Rosenberg 2013, 195-198). The 'whip' arises from societies' uneven military strength, which compels relatively weaker societies to adopt innovations developed elsewhere to maintain military competitiveness and preserve their external independence (Rosenberg 2013, 195). The 'privilege' refers to 'latecomer' societies' ability to appropriate the latest innovations of other societies, enabling 'leaps' in development (Rosenberg 2013, 196). Intersocietal appropriation of practices and technologies does not result in straightforward acceleration along a path of unidirectional development; rather it produces radically different 'combined' social formations (Rosenberg 2013, 196-197).

While these concepts have proven useful for generating causal analyses of intersocietal politics, the 'whip' and 'privilege', either assume a linear scale for measuring relative levels of development or/and conceptualise development in aggregate terms, which de Oliveira (2019) warns against. Individual authors have presented different criteria by which to discern whether societies are relatively 'advanced' or 'backward' and can thereby be assumed to be either wielding or reacting to the 'whip'.

Rosenberg (2006, 329-330) has defined relative levels of development as discernible through 'an ascending linear scale', defined with reference to 'three abstract, comparative dimensions'. These abstract comparative dimensions are 'the productive transformation of nature, the orchestration of social power and the cultural rationalization of knowledge forms' (Rosenberg 2006: 329). This amounts to defining relative levels of development through societally aggregated growth, measured against a linear developmental scale.

Matin (2013a, 18) only uses the terms 'advanced' and 'backward' with reference to capitalism, as signifying precapitalist societies' fundamental economic and military uncompetitiveness in relation to capitalist societies. While Matin (2013a, 18) stresses that this is not meant as a normative verdict, these concepts also treat development in aggregate societal terms, measured against a linear scale of economic productivity and social power to differentiate between 'advanced' capitalist societies and 'backward' precapitalist societies.

Anievas and Nişancioğlu (2015, 56) state that they use the terms 'advanced' and 'backward' not to describe progression towards 'mode advanced' developmental stages, but to instead denote relative power relations between societies, as determined by their ruling classes' ability to reproduce themselves and expand their influence. They provide the example of the 17<sup>th</sup> century Ottoman empire, which was more powerful

than the emerging capitalist societies of England and the United Provinces—and thereby more ‘advanced’. This use of the ‘advanced/backward’ distinction may break with linear scales for measuring relative levels of development. However, defining relative statuses of ‘advanced’ and ‘backward’ through the aggregated social power of societal ruling classes still imposes constraints on the approach’s ability to generate varied answers to questions of ‘development for whom?’. It is unclear why Anievas and Nişancıoğlu persist with the ‘advanced/backward’ terminology, as it appears that terminology without linear developmentalism connotations like ‘dominant/subordinate’ could fulfil the same function.

The ‘whip’ imposes further analytical constraints through its focus on societies’ efforts to preserve their external independence, implying that the only societies succeeding in this are considered societies of the ‘intersocietal’. Indeed, it is impossible to react to the ‘whip’ if external sovereignty has already been forfeited. This reduces the ‘intersocietal’ to the states-system from the moment states made interlocking sovereignty claims over the world’s landmass.

The concepts that build on the ‘whip’—by theorising societal reactions to it—also focus on state agency. These include ‘substitution’ (Rosenberg 2013, 197), whereby the state takes the role of initiating and directing capitalist industrialisation in the absence of an industrial bourgeoisie; ‘defensive accumulation’ of increasing exploitation through taxation/tribute extraction; and ‘defensive modernisation’ (Matin 2013a, 55-56), which overlaps with ‘substitution’. These concepts are of great utility for causal explanation of intersocietal politics, but limit the approaches’ ability to provide varied answers the question of ‘development for whom?’. Moreover, they appear to only address development for states that survive under the ‘whip’ through various adaption strategies.

The ‘privilege’ refers to the possibility of drawing ‘together different stages of the journey’, enabling ‘skipping over intermediate steps’ (Anievas and Nişancıoğlu 2015, 48). Such skipping entails that no two societies can retrace the same developmental path—and may also result in debasement of the imported practices (Rosenberg 2013, 200). But the concept of the ‘privilege’ still requires a linear scale of reference for measuring societies’ relative developmental levels, to discern what stages of the journey are being drawn together or skipped over, and for ascertaining whether or not the imported developmental practices are being debased.

Taken together, these concepts amount to an excellent explanatory framework of intersocietal—and particularly inter-state—politics, as demonstrated by the rich output of empirical research informed by them. The downside is the analytical frameworks’ limited ability to go beyond theorising the intersocietal’s most powerful entities’ actions and their impact on development. This limitation constrains their ability to generate answers to the question of ‘development for whom?’ in any systematic way, unless it is development for the dominant entities of the intersocietal and their ruling classes. It must be recognised that these adaptations of U&CD have also been used to theorise revolutions—in which the agency of the subaltern may be crucial—and resistance toward varied forms of combined capitalist exploitation (Anievas and Nişancıoğlu 2015, 278-282). Matin’s (2013a) excellent account of the Iranian 1979 Revolution is a prime example of the former. Still, as explanatory frameworks, they remain geared toward theorising societies’

reactions to external threats and the resulting developmental consequences. A normatively oriented adaptation of U&CD should be developed to enable more varied, normatively informed—but still theoretically driven—answers to the question of ‘development for whom?’.

This paper suggests a way to accomplish this task through a synthesis with Dussel’s LP. Moving forward, I retain U&CD’s core social ontology of uneven and interactive societal multiplicity and its implications for social development. I retain the concept of ‘combination’, but discard the concepts of the ‘whip’ and ‘privilege’. The two latter concepts’ requirements for societal development ranking have problematic connotations, as the U&CD scholars have pointed out in their critiques of Eurocentrism. Moreover, the ‘whip’ unnecessarily reduces the ‘intersocietal’ to societies that have succeeded in preserving their external sovereignty. This goes against the spirit of U&CD, for the reconstitution of societal agency within combined colonised societies should be within its core analytical domain. The following section will turn to Dussel’s LP for normatively oriented concepts that can be adapted to U&CD’s universal social ontology.

### **Dussel’s liberation philosophy**

Matin, Anievas and Nişancioğlu have all expressed the position that, although postcolonial scholarship has ably critiqued the Eurocentrism of mainstream IR theories, it remains unable to supplant them with an alternative non-Eurocentric IR theory due to a reluctance to use universal abstractions—which postcolonial scholars associate with Eurocentric connotations of the Western with the Universal. Indeed, Matin, Anievas and Nişancioğlu argue that a universal social ontology is necessary for a non-Eurocentric theory of the intersocietal. Rather than accepting the Eurocentric reification of the universal as a homogenising force, they maintain that it should be rearticulated as a heterogenising force, for which U&CD provides the conceptual means (Matin 2013a, 2-3; 2013b, 370; Anievas and Nişancioğlu 2015, 39-40; 2017, 67-69; Anievas and Matin 2016a, 6).

While the critique of lacking a universal social ontology may be valid in relation to postcolonialism, it does not apply to the Latin American decolonial tradition, which is closely associated with ‘world-systems theory’ (WST) (Frank 1967; Quijano 2000). The Latin American decolonial tradition is distinct from the postcolonial one, as it is premised on continuity between colonial and postcolonial rule in the Americas, where criollo descendants of white settlers continued to dominate states and marginalise indigenous and black populations. For example, the Peruvian decolonial scholar Anibal Quijano (2000, 533-534, 568) characterised the coloniality of Latin American state power as premised on the twin pillars of racial hierarchy and dependent export of primary commodities. He saw genuine decolonisation as premised on dismantling both structures.

Dussel (1985, 1-3) also relies on WST. It does not form an integral part of his LP, but rather appears sporadically when he needs to remind the reader of global capitalism as a constraining structure. The limitation of WST, namely leaving little room for agency in resisting capitalist domination, has been well established (Hobson 2012, 240-242). As I aim to formulate an analytical approach capable of illuminating



the societal agency of groups marginalised by the dominant structures of the ‘intersocietal’, WST is unsatisfactory. However, without it, Dussel’s LP has nothing to incorporate the wider intersocietal backdrop or capitalism as a global structural force. U&CD offers an alternative, inherently dynamic universal social ontology capable of illuminating the wider intersocietal backdrop. It also frames capitalism as a structural force that is unevenly realised, producing varied forms of oppression and resistance. LP, on the other hand, provides the normatively oriented concepts that U&CD is currently lacking. Before moving on to the specifics of my proposed synthesis between these two approaches as a normatively oriented analytical approach to the intersocietal, an outline of the basic premises of Dussel’s LP is needed.

In very broad terms, Dussel conceptualises the social world as taking the expression of a complex set of relations among totalities of shared human meaning, which exist in relations of relative inequality and power struggle. Further, dominant totalities have the capacity for violence to enforce acceptance of their preferred meanings, rendering suppressed totalities of shared meaning ‘exterior’ (Dussel 1985, 41; 2013, 298-299). There is always latent potential for liberating transformations of dominant totalities by removing the impediments they impose on exterior totalities, thereby allowing them to flourish. The occurrence of such liberating transformations hinges on the agency of the exterior communities in asserting their ethical demands toward the dominant totalities (Dussel 1985, 68-76; 2013, 299).

The starting point for Dussel’s LP is derived from Emanuel Levinas’ phenomenology, which treats ethics as the first foundational philosophy. This is premised on the assumption that physical proximity with the Other is the prereflexive state from which all thought processes originate; for we intuitively understand that the face of the Other makes unconditional ethical demands not to be killed, but rather to be cared for (Dussel 1985, 17; 2013, 271). This compels us to confront nature to obtain the goods necessary for ensuring the survival of the Other, opening ontological horizons into which sense impressions are systematically incorporated with reference to whether they are helpful for perpetuating life, which is the universal foundation upon which all further human knowledge is built (Dussel 2013, 278). The ethical duty to provide for the survival and wellbeing of the Other leads us to build evermore complex ontologies and coordinate as larger communities of shared meaning and divisions of labour. These production communities are instrumental totalities (Dussel 1985, 22).

The unconditional ethical duty towards the Other generates a set of universal material-ethical requirements that all societies—to an extent—must fulfil, as neglecting them would result in their destruction (for example through uninhibited violence or starvation) (Dussel 2013: 96-99). Dussel (2013, 93-106) formalised these preconditions for human social existence as the ‘universal ethical-material principle’. They include food, security, dwelling and autonomy in deciding how to obtain and produce these goods and how to realise the cultural and aesthetic functions of life (Dussel 2013, 93-96). While these are transontological material-ethical requirements, their fulfilment entails organising into instrumental totalities, which enter the realms of ontology culture and morality<sup>1</sup> to deliberate on how to organise complex labour

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<sup>1</sup> Dussel distinguishes between ethics and morality. Ethics is transontological, knowable through the state of proximity and pertains to human physical survival. Morality is a normative system embedded within a totality.

tasks to meet the totality's ethical needs and aesthetic preferences (Dussel 1985, chapter 4). Dussel has formalised the ideal for how communities should deliberate on their material self-reproduction as the 'universal validity criterion'. Fulfilling it requires the symmetrical inclusion of all individuals affected by a decision in the deliberation process (Dussel, 2013, 104, 144-155).

Paradoxically, the formation of instrumental totalities to fulfil the ethical duty towards the Other opens the possibility of alienation—losing sight of the ethical responsibility towards the Other and negating it—by individuals assuming labour roles standardised through ontological categories (the builder, the farmer, the nurse). This risks covering their humanity by reducing them to production inputs. As divisions of labour grow more elaborate, inequalities in influence—meaning under fulfilment of the universal validity criterion—social standing and material wealth inevitably emerge (Dussel 1985, 40; 2008, 80). Recognition that the universal ethical-material principle and the universal validity criterion are ideals that should always be strived for, but are impossible to fully realise in practice, generates an additional 'critical validity criterion' (Dussel 2008: 80). The critical validity criterion draws attention to marginalised groups through the concept of 'exteriority'. Exterior groups are mistreated by the dominant totality's constituents, either because they cannot perceive that they are harming them, or because they misrecognise them through stigmatizing ontological categories (like 'uncivilized' or 'backward') and see their maltreatment as warranted or even benevolent (Dussel 1985, 39-45; 1995, 65-66).

'Critical validity' refers to when members of exterior groups form into 'critical communities' and achieve consensus on the sources of the injustices suffered by them (reality II) and potential pathways to liberation. These they communicate toward the dominant totality, seeking to invalidate its truth claim (reality I) (Dussel 2013, 344-347). As extra-systemic critiques are typically ignored or denied, exterior critical communities must rely on direct methods in communicating their demands toward the dominant totality (Dussel 2013, 347). The greatest potential for liberating transformation arise in situations where exterior communities are driven by desperation to unconceal themselves in the dominant totality's public realm as something else than the dominant totality's portrayal of them (Dussel 1985, 44-47; 2013, 282-285). This replicates the face-to-face encounter with the Other on a collective level, as the constituents of the dominant totality are faced with a group in their midst that exceeds the confines of their ontological horizons, prompting them to reassess the assumptions of the dominant totality (reality I) (Dussel 1985, 44-47; 2013, 282-285). To fulfil the 'critical validity criterion', the dominant totality's constituents would have to renounce their current truth claim (reality I) and accept the exterior critical community's contrary truth claim (reality II), which would entail a liberating transformation of the dominant totality, removing the obstacles to the fulfilment of the exterior marginalised community's rights under the ethical-material principle (Dussel 2013: 344). Both the dominant and exterior groups would stand to benefit from such liberating transformation. The exterior groups carry cultural and normative resources beyond the current ontological horizons of the dominant totality, making them a potential source of its revitalisation (Dussel 1985, 41-45). All 'liberating' transformations are incomplete, with remaining and emerging injustices between and within totalities.

Therefore, liberation struggle is always a continuous process, as the utopia of completely overcoming all alienation is practically unachievable (Dussel 2008, 80).

Not all exterior groups are necessarily more ethical than the dominant totalities. For example, the Confederate States of America was extinguished as a totality through its defeat in war and re-incorporation into the United States. However, the myths and ideals of the Confederacy have survived in former Confederate states, which has spawned clandestine violent white supremacist groups. It is possible to discern between different exterior groups with reference to the universal material-ethical principle. Exterior groups whose political claims involve systematically denying the entitlements of other groups under the material-ethical principle are unethical. In general terms, the assessment of political demands in relation to Dussel's formal ethical principles (henceforth the 'ethics of liberation') is not a clear-cut binary between the ethical and unethical. Rather, it is a spectrum between utopia and worldly imperfection, where the ethicality of political propositions are judged by whether they would be closer to realising those ideals than the status quo is.

Dussel has also addressed the ethicality of organised violence. All violence entails alienation and denial of the humanity of the Other. Still, Dussel sees the universal ethical-material principle as including communities' right to self-defence against those who would deny their entitlements (under said principle) through violence that is proportionate to the harm being inflicted upon them (Dussel 2013: 409). Having laid out the basics of Dussel's LP, we turn next to incorporating it as an aspect of a normatively oriented adaptation of U&CD.

### **Uneven and combined liberation philosophy**

The aim with forming a synthesis between U&CD and Dussel's LP is to use their complementary strengths to offset their limitations and formulate a normatively oriented theory of societal multiplicity. LP's weakness is reliance on the structurally deterministic WST to illuminate global capitalism and the states-system. A thin version of U&CD, stripped of the concepts of the 'whip' and 'privilege', but retaining 'combination', can replace WST as a universal social ontology of interactive societal multiplicity. 'Thin' U&CD is capable of illuminating the dominant governing structures and modes of production, while allowing for subaltern agency in resisting them. It enables longitudinal historical narratives, focusing on the interactive unfolding of the dominant totalities of the intersocietal, which in the modern era are capitalism and the states-system. Dussel's concept of exteriority serves as a constant reminder that there are societies and economic systems suppressed by the dominant structures. They may have a high level of autonomy, but can also be linked with the dominant totalities through exploitative exchange relations—or be subject to displacements and confiscations. The longitudinal historical narrative of U&CD can be paused at any time, which allows for an assessment of the relations between dominant and exterior totalities informed by Dussel's 'ethics of liberation'. Dussel's critical validity criterion is activated by forceful dissent from an exterior totality addressed toward the dominant totality. Such eruptions of exterior critical communities require an ethical assessment of their political demands—and of the dominant totality's response—with reference to Dussel's

‘ethics of liberation’, as well as an assessment of prospects for further liberating transformations. U&CD’s ontology of the ‘intersocietal’ and concept of societal combination can be used to trace the intersocietal origins of the exterior critical community. Thus, the critical validity criterion and U&CD can be used to analyse the constitution of new exterior forms of societal agency.

Regarding the specifics of how I intend to use U&CD to generate longitudinal historical analyses that illuminate the dominant structures, I follow Anievas and Nişancıoğlu’s lead in using accumulation of wealth and power as the markers by which to identify the dominant structures of a time. As my cursory application of the combined conceptual framework is situated in the era of capitalist modernity, the dominant structures are those of capitalism and the states-system. U&CD scholars have defined capitalism as consisting at its core of the wage-labour-capital relation, while taking combined expression with other forms of exploitation, including racialised and gendered (Anievas and Nişancıoğlu 2015, 218, 278-282). The modern state to a large extent reflects the relative power of society’s social classes. But the state also has a level of autonomy through professionalised bureaucracies and political classes. Factors like race, gender, ethnicity, language, nationality and legal status also influence how state power is used in relation to different groups of people. The ideologies of developmentalism are themselves a factor influencing state behaviour in ways that can run counter to the logic of capitalism.

U&CD scholars have ably demonstrated how developmental states overturn the internal logic of capitalism, as captured by the concept of ‘substitution’, whereby the state replaces capitalist accumulation and investment (Rosenberg 2013, 200). U&CD scholars have tended to theorise state-led developmentalism as responses to the ‘whip’. I maintain that the ‘whip’ can obscure as much as it can illuminate in understanding societies’ developmental trajectories, as developmental choices are often made from a position of submission to the ‘whip’ rather from defiance to it. For example, Quijano (2000, 566) described how post-independence Latin American criollo elites *opted* for dependent export of raw produce in exchange for manufactured goods, as their interests were more aligned with foreign industrial powers than with the majority of their states’ populations. In Quijano’s (2000, 567) words, ‘there was no national interests’. Other examples include development under terms dictated externally through the World Bank and IMF’s structural adjustment programs. Leninist development is an interesting case, as it originated in defiance toward the ‘whip’ wielded by capitalist states, but was later imposed through external pressure on countries within the Soviet sphere of influence after the Second World War. Thus, the ‘whip’ is not particularly helpful for theorising societal developmental trajectories, as it produces submissive as well as defiant responses.

U&CD can illuminate the intertwined emergence and evolution of capitalism and the modern states-system. However, after the global consolidation of the modern states-system, U&CD-informed analyses have proven unable to incorporate societies other than states as entities and agents of the ‘intersocietal’, due to their causal orientation. This is where the complementary qualities of LP come into play, as its concept of exteriority allows seeing beyond the intersocietal’s dominant totalities. This enables varied, normatively informed answers to the question of ‘development for whom?’ by drawing attention to groups

that are marginalised by the intersocietal's dominant structures. This includes groups that self-identify as distinct peoples but are denied representation by the states-system.

Incorporating LP's concept of exteriority also enables addressing David Blaney and Naeem Inayatullah's (2016, 246-247) critique that U&CD informed historical narratives risk systematically erasing how cultural encounters encapsulated by the process of 'development' resulted in the destruction and assimilation of non-Western cosmologies. Their critique is along the same lines as Dipesh Chakrabarty's critique of historicism's inability to incorporate knowledge produced within non-secular cosmologies, as invoking transhistorical beings breaks the rules for recording history (Chakrabarty 2000: 22-23, 237-255). Chakrabarty contrasts historicism to the method of hermeneutics, which is capable of representing reality from perspectives situated within non-secular cosmologies (Chakrabarty 2000: 16-18). Dussel (1995) has frequently used the method of hermeneutics to reconstruct history from the perspective of the non-secular cosmologies of marginalised parties. For instance, he used Aztec cosmology to reconstruct for the Aztec experience of encountering the Spaniards. Incorporating LP's hermeneutical method for analysing exterior totalities enables responding to Blaney and Inayatullah's (2016, 246-247) call to recover knowledge from non-secular cosmologies. My cursory application of this combined theoretical framework below does not live up to the requirements of deep hermeneutical analysis, but it is at least possible in principle.

In summary, my preliminary synthesis of U&CD and LP uses them in a complimentary manner, where U&CD serves to illuminate the dominant political and economic structures and the concept of combination draws attention to the intersocietal causal dimension, while Dussel's concept of exteriority highlights societies suppressed by the intersocietal's dominant totalities. Dussel's critical validity criterion is activated by open dissent expressed from exterior communities toward the dominant political and economic structures, requiring an analysis their political demands and of the dominant totality's response with reference to Dussel's 'ethics of liberation'. To assess the exterior community's political demands and dominant totality's response, the conditions under which they were formed must be understood, which brings U&CD's concept of combination into play, as it enables tracing the intersocietal origins of both totalities. In this way, LP's critical validity criterion, in conjunction with U&CDs concept of combination, draws attention to the constitution of new forms of exterior societal agency through intersocietal interaction. The following section provides a demonstration of this combined theoretical framework through its cursory application to the case of the Chiapas Zapatista movement and its relations to the Mexican state as expressive of intersocietal relations between a dominant and exterior totality.

### **Uneven and combined liberation politics: the case of the Zapatista movement**

In 1994, the *Ejército Zapatista de Liberación Nacional* (Zapatista Army of National Liberation, EZLN), consisting predominantly of indigenous Maya *campesinos*, staged an armed uprising in the southern Mexican state of Chiapas (Mentis 2006, 9-10). This was the eruption of an exterior society whose existence the dominant totality of the Mexican state had denied. The EZLN's uprising was in response to the existential

threat Mexico's indigenous societies saw from the North American Free Trade Agreement's (NAFTA) opening of communal *ejido* lands to private investment (Mentis 2006, 4; Cuninghame and Corona 1998, 15). This is the kind of eruption of an exterior community into a dominant totality's public realm that Dussel's critical validity criterion draws attention to. Providing an ethical assessment an exterior totality's political demands and the dominant totality's response requires some understanding of the conditions of their formations and inter-relations. Below is a brief account of Mexican state-indigenous relations and Mexico's economic development informed by the combined U&CD-LP analytical framework. This is followed by an analysis of the formation of the combined totality that became the Chiapas Zapatista movement, and an ethical assessment of the exterior Zapatista totality's political demands and the dominant Mexican totality's response.

Upon Mexico achieving independence (1821), its indigenous peoples were made formally equal citizens, but they gained little from this, as they were stripped of previously recognised communal land titles and remained blocked from upward social mobility by entrenched racial hierarchies (Grote 1999, 504-505). The dissolution of indigenous communal landholding enabled further expansion of large criollo-mestizo *hacienda* estates. Extreme inequality of land distribution was one of the principal reasons behind the Mexican 1910-1919 Revolution, particularly for the faction led by Emiliano Zapata (under the slogan of 'land and liberty') (Grote 1999, 504-505).

Adam David Morton's (2011, 48-52) U&CD informed analysis describes the outcome of the Mexican Revolution as an inconclusive stalemate of class power. The *Partido Revolucionario Institucional* (Institutional Revolutionary Party, PRI<sup>2</sup>)-led party-bureaucratic corporatist state mediated between the weakened, but still powerful, criollo-mestizo landed oligarchy, the military, a weak state-support-dependent urban bourgeoisie, a nascent state co-opted urban working class and the peasantry, which was appeased through the newly created *ejido* system of state-owned communal lands.

Indigenous peoples' situation was improved through allocation of *ejido* lands, though they were generally marginal rain-fed lands outside the major irrigation systems, leaving the best lands within criollo-mestizo *haciendas*, particularly in Chiapas (Morton 2011, 55). The persistence of racial hierarchy must be added to Morton's class-based analysis. Mexico's racial hierarchy was made less rigid through the PRI's '*mestizaje*' mono-nation-building project, which sought to 'include' indigenous peoples through their assimilation to mestizo culture. Indignity was thus misrecognised in purely negative terms as a status of backwardness, which could be overcome through assimilation to mestizo culture (Tavanti 2003: 107).

Economically, post-revolutionary Mexico pursued an industrialisation program. This began in earnest through the populist Cárdenas administration's nationalisation of US-owned oil installations and railroads in 1938, with the state substituting organic capitalist accumulation and investment through state-owned sectoral investment banks (Morton 2011, 56, 75). Mexico followed an import-substitution strategy until the 1970s oil boom and subsequent 1980s oil crash rendered Mexico heavily indebted and dependent on

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<sup>2</sup> Know by different names before 1946

austerity-conditioned IMF bailouts. As a result, Mexico's trajectory shifted toward neoliberal export-oriented industrialisation, culminating in the implementation of NAFTA in 1994 (Tavanti 2003, 55; Morton 2011, 114-114).

The gains of Mexico's industrialisation were concentrated in the north. Chiapas supplied the majority of the country's hydropower, while having the fewest households with access to electricity (Morton 2011, 205-206). Chiapas' internal inequalities were even worse, as mestizo *haciendas* controlled the best lands and used the security services and paramilitaries—consisting of destitute indigenous locals—to terrorise *campesinos* who tried to organise against them. NAFTA's liberalisation of maize markets, leading to a steep price drop and the opening of *ejido* lands to private investment, led many of Chiapas' Maya *campesinos* to join the EZLN to take up arms against the Mexican state and NAFTA's implementation (Morton 2011, 215; Tavanti 2003: 56-58).

While this establishes the broad configuration of the Mexican state-indigenous relations and the economic conditions that led to the Chiapas uprising, it does not explain how the Zapatistas could develop societal agency capable of challenging the Mexican state or the nature of their political demands. 'Syncretism' is a helpful concept for understanding the process of societal combination that led to the emergence of the Zapatista movement. It is used to describe the merger of imported religions with native spiritual beliefs and practices, and the idea applies well to the Maya. Indeed, while the Maya converted to Catholicism as a survival strategy during Spanish colonialism, they retained many of their prior beliefs and rituals, rededicating them to the Christian God or a saint (Tavanti 2003, 15, 30-32, 112). Syncretism can also be extended to how the Maya assimilated external political ideologies and practices. Maya pilgrimages are an example of religious and political syncretism. Even today, pilgrimages are made to pre-Colombian sacred sites, which are now dedicated to some Catholic saints *and* ancestral and natural spirits (Konrad 1991). This practice has since been extended to politics, as the Zapatistas and other affiliated Mayan groups have conducted weeks-long protest marches (also referred to as "pilgrimages") to Mexico City, fusing both religious and political meaning (Tavanti 2003, 184; Kovic 2003, 65).

The emergence of the Zapatista movement, as well as its military arm of the EZLN, follows this pattern of syncretism. Both were formed from Maya communities that had assimilated influences from Catholic liberation theology, Marxism and liberal human rights politics to their Mayan world view. The Zapatista movement was a radically new and potent combined totality, capable of confronting the dominant totalities of the Mexican state and global neoliberal capitalism. The liberation theology influence came through the work of Chiapas' Bishop Samuel Ruiz (Kovic 2008, 259), whereas the Marxist influences arose through guerrillas originating in the late-1960s Mexico City student movement. These guerrillas had since relocated to Chiapas after the 1968 Tlatelolco massacre (Mentinis 2006, 2-3). The liberal human rights discourse came in part through Ruiz's diaconate's work (Kovic 2008, 262) and in part through the foreign NGOs the Zapatistas attracted during the crisis (Speed and Leyva Solano 2008b, 214).

Ruiz arrived in Chiapas in 1960 as a conservative, intent on helping the indigenous assimilate by teaching them Spanish and the catechism. He was, in his own words, 'converted by the poor' (Kovic 2008, 259)

through his daily interactions with them. He was also influenced by broader intersocietal developments, for he attended the Second Vatican Council (1962-1965) and the 1968 Medellín, Colombia meeting of Latin American Council of Bishops, in which the Latin American Catholic Church committed to a proactive role in fighting poverty (Tavanti 2003, 113; Kovic 2008, 259). These two events facilitated the emergence of the Marxist influenced Catholic liberation theology, of which Ruiz became an enthusiastic proponent. Ruiz developed it further into 'Indian theology', which valorises the syncretism of Catholicism and indigenous beliefs and rituals. Additionally, by departing from God's desire for all individuals and peoples to live in dignity, free from exploitation, Ruiz adapted the liberal human rights discourse to the syncretic religious outlook of the Maya. In Chiapas, this meant access to arable land (Kovic 2008, 257-268; Speed and Solano 2008b: 210). Ruiz's diaconate trained thousands of indigenous catechists to spread his teachings and ultimately to set up the Fray Bartolome de Las Casas Human Rights Centre (CDHFBC) in 1989. The purpose of the CDHFBC was to document and publicise human rights abuses and organise human rights workshops among the locals (Speed and Leyva Solano 2008a, 211; Kovic 2008 262). The indigenous catechists created both the spiritual and organisational foundations of what became the Zapatista movement, with many becoming EZLN Comandantes (Speed and Leyva Solano 2008b: 222; Kovic 2008, 269).

EZLN spokesperson Sub-Comandante Marcos described how the urbanite student movement-rooted guerrilla force, the *Fuerzas de Liberación Nacional* (National Liberation Forces, NLF), underwent a similar 'conversion' process as Ruiz, transforming from an aloof vanguardist force to a 'rearguard' obedient to the local Maya communities (Dussel 2011, 543-544). The NLF merged with the local Maya *campesino* militias—that had formed from the Maya *campesino* movement Ruiz had helped organise—into the EZLN (Mentinis 2006, 2-3). Thus, the Chiapas Zapatista movement formed through syncretic assimilation of progressive Catholicism, militant Marxism, and liberal human rights politics into the local Maya culture, forming a new combined totality with a distinct societal agency.

The EZLN erupted into the public realm of the dominant Mexican totality in response to the implementation of NAFTA in January 1994. The group launched an armed takeover of seven Chiapas towns, issuing a declaration of war against the Mexican government. The Mexican government reacted by sending the Army to Chiapas, resulting in brief skirmishes (Mentinis 2006, 9-10; Cuninghame and Corona 1998, 14). With little hope of prevailing in a prolonged armed conflict, the EZLN relied on media to convey its truth claim (reality II) to the dominant urban Mexican totality's constituents. By drawing a response from civil society, the EZLN hoped to challenge the Mexican state's stigmatising portrayal of indigeneity and unidirectional developmentalist-assimilationist narrative (reality I) (Mentinis 2006, 9-10; Speed and Leyva Solano 2008b, 212). The EZLN's communiqués resonated with the urban Mexican totality, with massive protests erupting in major cities against the government's handling of the Chiapas crisis, as well as more limited protests in the United States and Europe (Mentinis 2006, 9-10; Speed and Leyva Solano 2008b, 212). Another intersocietal dimension of the conflict was the influx of foreign human rights NGOs, which



the EZLN relied upon to publicise military and paramilitary violence against Zapatista communities (Speed and Leyva Solano 2008b, 214).

Dussel (2003, 170) provided a contemporaneous assessment of the ethicality of the demands expressed in the EZLN's early communiqués. The EZLN's first demand was for *dignity*, which Dussel (2003, 172) saw as corresponding to the originary ethical moment of proximity, as recognising the human dignity of the Other is the precondition for any dialogue. The EZLN's second demand was for *life*, which Dussel saw as corresponding to the universal ethical-material principle. The second demand stood for a rejection of the structural economic conditions the Mexican state had imposed on Chiapas, which subjected the Maya to continuous avoidable deaths and ailments (Dussel 2003: 172-173). The EZLN's third demand was for communal solidarity, which Dussel saw as corresponding to the universal validity criterion. This third demand called for respect for self-governance through indigenous consensus-oriented decision-making practices, as well as free and fair elections at the national level (Dussel 173-176). Thus, having critically assessed the EZLN's political demands, Dussel found that they were indeed ethical.

The widespread protests across major Mexican cities pressured the Mexican government to negotiate with the EZLN (Speed and Leyva Solano 2008b, 212-213), which would have been a step toward compliance with Dussel's universal validity criterion if done in good faith. The negotiations produced the San Andrés Accord, promising autonomy for the Zapatistas and other indigenous communities. This agreement would have been acceptable to them (Cunningham and Corona 1998, 14). However, the Accord was never implemented, as the Mexican government soon resumed its military offensive, sparking another wave of mass protest across Mexico and renewed negotiations (Mentis 2006, 18-19). This pattern of broken government promises and stop-start negotiations continued until the PRI lost the presidency after 71 years of continuous rule in the 2000 election. This electoral result came in large part due to the PRI's handling of the Chiapas crisis (Mentis 2006, 19-26; Cunningham and Corona 1998, 14). The then-newly elected president, Vicente Fox of the *Partido Acción Nacional* had made finding a political solution to the Chiapas situation an election promise and invited the Zapatista leadership to negotiations in Mexico City the following year (Mentis 2006, 25-26; Otero and Jugenitz 2003, 513-145). The resulting reforms were limited to a constitutional amendment that nominally enabled indigenous autonomy, but provided no mechanism for its implementation. The EZLN and most other Mexican indigenous peoples' organisations condemned this outcome (Otero and Jugenitz 2003, 518).

In 2003, the EZLN implemented the San Andrés Accord unilaterally through the creation of the Zapatistas Rebel Autonomous Counties (*Municipalidades Autónomas Rebeldes Zapatistas*), which cover about 40 per cent of Chiapas (Otero and Jugenitz 2003, 518; Dinerstein 2014, 241-242). The autonomous municipal governments are called *caracoles* (snails), which is yet another expression of syncretism. The term references the Mayan ritual of walking in a spiral pattern when moving from the church to the community field, symbolising the journey of life and commitment to its realisation in the community (Tavanti 2003, 111). The *caracoles* have rotating leadership positions and are responsible for organising autonomous

schools, hospitals and production cooperatives that prioritise internal markets but also export coffee through direct internet marketing (Dinerstein 2014, 245-246).

In summary, the Zapatista autonomous area remains an exterior, unrecognised totality of Mexico. The Zapatistas' demands are ethical. With reference to the universal ethical-material principle, the Zapatistas are claiming the means to live and autonomously develop their communities, which the dominant Mexican totality and global capitalism have denied—and threaten to erode further—by confining them to marginal lands. The state has also denied the Chiapas *campesinos* access to education and healthcare and actively terrorised them through official and irregular armed forces. As the EZLN and its predecessor militias emerged in response to PRI-aligned local paramilitaries, its violence was legitimate self-defence. Prior to the 1994 Chiapas uprising, local Maya *campesinos* had staged pilgrimages to local and national authorities, demonstrating that communication through official channels was not effective, as they were met with police violence or empty promises (Kovic 2008, 270-271), justifying the EZLN's direct methods. In relation to the critical validity criterion, large swathes of the dominant urban Mexican totality's constituents accepted the EZLN's truth claim (reality II) and—in turn—demanded liberating change through public protests and by voting out the PRI from office. However, the Mexican government, even under the Fox administration, remained unwilling to commit to such change, and has continued low-intensity terror activities through paramilitaries and military intimidation against Zapatista communities (Dinerstein 2014, 246-247). These outcomes fail to live up to any of Dussel's ethical criteria. Thus, the dominant Mexican totality continues denying the EZLN's ethical demands. Nevertheless, the EZLN did revitalise this totality by catalysing genuinely competitive elections for the first time.

The combined U&CD-LP analytical framework addresses the question of 'development for whom?' by drawing attention to those protesting current developmental trajectories. While there has been plenty of extractive industrial development in Chiapas, the majority of the local population has gained little from it. The Zapatistas have, despite the government's non-recognition, asserted their right to make their developmental trajectory their own ethical choice. In turn, they have opted for a radically novel developmental trajectory, which combines traditional Mayan practices, like subsistence shifting cultivation of maize and beans, with commercial coffee cooperatives, artisan workshops, modern technologies and medicine and autonomous bilingual education (Dinerstein 2014, 252).

## **Conclusion**

This paper is meant as a first step in building a synthesis between U&CD and Dussel's LP as a normative theory of societal multiplicity, utilising both approaches' unique complementary strengths to offset their weaknesses. It has been argued that, while U&CD has proven effective in theorising the causal consequences of societal multiplicity, this causal focus limits the kinds of normative questions it can pose and answer. LP is a normatively oriented approach that is constrained by its reliance on WST as a universal social ontology, which lacks sensitivity to the constitutive role of intersocietal interaction, and leaves little room for effective resistance to global capitalism. Substituting WST with a thin version of U&CD as its

universal social ontology gives the combined theoretical framework the capacity to perceive the all-pervasive influence of intersocietal interactivity and the unevenly realised dominant structures of the states-system and global capitalism. LP's concept of exteriority, on the other hand, allows seeing the suppressed social formations and economic systems beneath these dominant structures. U&CD enables longitudinal historical narratives focused on the uneven and combined unfolding of the dominant structures, while LP's critical validity criterion draws attention to dissent emerging from the exterior, demanding ethical evaluation of the exterior community's political demands and the dominant totality's response. U&CD's concept of combination enables analysing of both totalities' formation and inter-relation, making the combined theoretical framework attentive to the formation of novel forms of exterior societal agency. This was demonstrated through its cursory application to the emergent exterior society of the Chiapas Zapatista movement, and its relation to the dominant Mexican totality. The combined framework enabled analysing the Zapatista movement's formation through the Maya's assimilation of progressive Catholicism, militant Marxism and liberal human rights politics to constitute a novel combined societal totality capable of confronting the Mexican state. More work is needed on specifying what concepts from the U&CD tradition are compatible with the combined U&CD-LP framework, as well as what alternative concepts can replace the discarded ones to further develop this nascent theoretical framework.

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