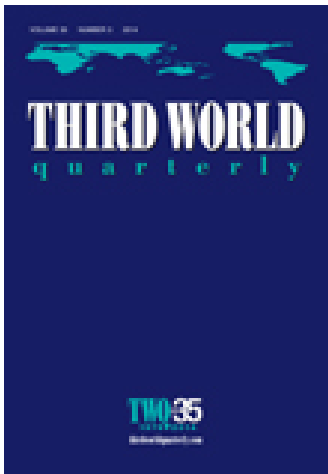


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(Neo-)extractivism – a new challenge for development theory from Latin America

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This paper addresses new challenges and identifies starting points for development theory following recent debates in Latin America on ‘new or neo-extractivism’. It focuses on the concept of neo-extractivism and the context of its emergence, and on the changing role of the state. Looking at a number of social economic indicators, we find that, even after considering differences between countries, (neo-)extractivism is not merely a temporary economic strategy in the region. Instead, it exhibits features of a consolidated development project. Empirical evidence from the region shows the fundamental implications of resource-based development paths in politics, social relations and territorial orders. To grasp these implications conceptually, we argue for a shift in theoretical perspectives related to the link between development and resource extraction. Key elements for such a shift are to be found in recent studies in rentier theory and politics and new approaches in the field of political ecology.

Keywords: (neo-)extractivism; Latin America; development theory; rentier theory and politics; social conflict; political ecology

Since the days of dependency theory and Frantz Fanon’s *The Wretched of the Earth*, the influence of the ‘global South’ has declined steadily in debates about development theory and politics. Thanks to a global surge in raw materials and the resulting dynamics of development, this is changing. In Latin America heated debates are raging over the developmental, social and ecological implications of an intensified extraction of raw materials. In this context the concept of (neo-)extractivism plays an important role by referring to a set of specific, growth-oriented development paths in the region. These paths involve (1) extracting raw materials and natural elements such as minerals, energy carriers, and forest and agricultural goods; (2) exporting raw materials; and (3) using revenue to improve living conditions.¹ However, there is empirical evidence for such paths outside of Latin America. Thanks to international demand for raw materials, a resource-dependent development path is gaining momentum in other

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regions of the global South.² For Latin America extraction-based paths of development are nothing new.³ For most of the 20th century they were regarded as crisis-prone, politically unstable and poverty-reinforcing. They were allegedly vulnerable because of one-sided dependencies and fluctuating raw material prices. Today critical assessments of this type are qualified, usually with reference to the current dynamics of development. Several publications by the UN Economic Commission for Latin America and the Caribbean (ECLAC) argue that the ‘tendency towards re-primarization’ in the region (the return to producing primary goods) may be an opportunity for successful development.⁴ Similarly a number of influential think-tanks with close links to business and finance are highlighting the positive effects of extraction strategies, such as stabilising rates of growth, increasing direct foreign investment, expanding the middle classes and reducing poverty.⁵

All this shows how important it is for development theories to (re-)examine resource-based development paths. On one hand, global hunger for raw materials makes extractivism more and more attractive. This could lead to the emergence of a new development model. On the other hand, the intensification of raw material extraction and consumption has far-reaching consequences: global climate change, soil depletion, deforestation, loss of food sovereignty, declining biodiversity, contamination of freshwater, etc. This suggests that development theory should do more to address both the ecological and social effects of such a development path.

In this context the Latin American debate on (neo-)extractivism is stimulating. It provides some preliminary answers as to how development theory methods and analyses could address (neo-)extractivist tendencies. In this paper we will first present the concept of (neo-)extractivism and its key features. Second, we will look at a number of indicators in order to test empirically whether the current boom in raw materials in the region is merely a temporary economic strategy or a consolidated development project. Third, we will discuss the political implications of the predominance of this development path. We will show that the current practices of extraction lead to a transformation in politics, and that these same practices critically influence social relations. Finally, we will link our results with theories of rent and new political–ecological and sociospatial analyses. We will prove that current approaches in development theory can profit greatly from the Latin American debate.

(Neo-)extractivism in Latin America: concept and context

The Latin American debate on (neo-)extractivism is still relatively new; however, it has visibly developed in the past few years. The Uruguayan social scientist Eduardo Gudynas introduced the concept in a publication in 2009. He formulated several hypotheses concerning raw materials-based development and focused on progressive governments in the region.⁶ In this view, new or (neo-)extractivism partially breaks with the neoliberal strategy of privatising the export of raw materials, an idea known as classic or conventional extractivism and which has been dominant in Latin America in the past few decades. Two key features of this older form of extractivism were (1) the important role played by transnational corporations in the exploitation of raw materials and in the

appropriation of profits; and (2) the fact that the state was tasked with preserving this model internally. In contrast, the concept of (neo-)extractivism refers to the post-neoliberal policies of progressive governments. These regulate the appropriation of resources and their export by nationalising companies and raw materials, revising contracts, and increasing export duties and taxes. In addition, they use surplus revenue to expand social structures that favour development. In this framework the exploitation of nature serves to secure national development and sovereignty, to reduce poverty, increase social participation, to diversify local economies and to guarantee political stability. The practice of extractivism is associated with an imagined national interest and, consequently, becomes a politically legitimised new development project: (neo-)extractivism.

To show that (neo-)extractivism is not merely a short-term economic configuration but a comprehensive development project, we now turn to international developments and the changing role of the state. Since the early 2000s a significant increase in global demand has seen a corresponding rise in value of raw materials. This has resulted in steadily high prices. Various intertwined dynamics account for this. At the same time it is clear that there is no de-coupling of growth and resource use – despite all the appeals and programmes aiming to trigger a socio-ecological transformation of the existing patterns of production and consumption.⁷

According to recent estimates, the demand for primary energy from fossil fuels will increase by 45% until 2030, regardless of measures taken to save energy and increase energy efficiency.⁸ Behind this increasing demand is the consolidation and strengthening of resource-intensive modes of production and living in industrialised countries. The rise of ‘emerging economies’, in particular of China, is also contributing to this development.⁹ Rising demand increases the likelihood of conflicts over raw materials. Demand is also reflected in stable, high prices on the world market.¹⁰ Furthermore, the green economy – the economic model currently promoted in response to the tension between environmental protection and economic development – is still based on raw material extraction.¹¹ All in all, extraction-based, long-term development projects seem to be guaranteed a robust economic foundation.

At the same time few disagree that the neoliberal policies of structural adjustment in Latin America have failed. The primacy of the market, the retreat of the state and the opening-up of economies in the region – none has increased growth and competitiveness, instead, they have led to greater poverty and fuelled social inequalities. Therefore, international development agencies (and former protagonists of neoliberalism) are modifying their views on the state and re-embracing the idea that it should be the central agent of development.¹² Current economic and political trends in Latin America illustrate that the state is a key social actor again. The re-strengthening of the state is not only evident in the increasing regulation of extractive economies and the re-appropriation of their revenue through state institutions, but also in the expansion of public infrastructure, accompanied by a narrative of national sovereignty and development, a key source of legitimacy for the state.¹³

Put succinctly, Latin American (neo-)extractivism is characterised by the renaissance of the developmental state, which (1) steers and regulates the economies of extraction, appropriates extra revenue and mediates between diverging

interests; (2) acts as an agent of development and addresses the social question via supporting development projects in the region; and (3) creates political legitimacy for itself through democratic elections and a development narrative.

Critical accounts of (neo-)extractivism do not simply provide political-economy analyses. Increasingly they are focusing on sociospatial and socio-ecological contradictions. They consider the processes of territorial transformation spawned by different practices of extraction (eg mining, agro-industrial monocultures, oil and gas production), which entail the reordering of landscapes, and of social and labour relations, and the resulting spatial fragmentation. These processes also involve the creation of new territorial frontiers and enclosures, the emergence of enclave economies, the granting of exclusive rights of exploitation, the de-democratisation of the consumption of nature and comprehensive ecological destruction.¹⁴ Depending on how the actors affected interpret these changes, new social conflicts, protest movements and social divisions are possible. Critics point to the asymmetric integration in the world market of the countries concerned and argue that the current developments will create long-term economic dependencies.¹⁵

The weight of (neo-)extractivism in academic debates and in the politics of development has increased substantially. To analyse its global expansion more closely, we have to look at the material foundation of (neo-)extractivism. Despite the debates, the affirmative and critical accounts, and the fact that its key characteristics and contradictions have been identified, few systematic empirical accounts of (neo-)extractivism as a development project are available, because producing a convincing empirical account is especially difficult. In the region no standardised method of data collection for many of the indicators needed exists. Therefore institutions and authors use diverging definitions in their statistics. This makes inner-regional comparisons and syntheses difficult. Furthermore, the classification of primary and industrial goods is often inconsistent. The next section admittedly neither resolves these problems nor provides a comprehensive overview of the current dynamics of development in Latin America. Nevertheless, we believe that we can render the contours of (neo-)extractivism more distinct through a rough sketch employing empirical data.

Extraction in numbers – material and social aspects of (neo-)extractivism

Some standard indicators used to quantify raw material extraction processes are economic: Gross Domestic Product (GDP) total output and the composition of the national budget. These indicators can be examined with a focus on revenue from extraction. However, if there are correlations between economic indicators and social indicators such as poverty, employment and social and economic inequality, then a national development project must be considered.

Increases in the export of primary goods (whose value has nearly doubled in the past decade) are often interpreted as a ‘re-primarization’ of Latin American economies.¹⁶ Primary goods rose from constituting 27% of total exports in 2000 to 60.7% in 2011, notably exceeding total industrial exports.¹⁷ However, obvious regional differences remain. The export-based boom in raw materials is particularly pronounced in the Andean states: in 2011 their share of total exports was 87.3%. In Bolivia and Venezuela it was more than 95%. In the four

Mercosur countries (Argentina, Brazil, Uruguay and Paraguay) exports of primary goods in 2011 amounted to 67.1% of total exports; in Central America,¹⁸ the figure was 58.4%. With a 29.3% share of primary goods related to total exports, Mexico is the only country diverging from these trends. Even so, Mexico has seen a continuous increase in this indicator since 2000 (see Table 1).¹⁹

Total output volumes also show that raw materials have gained momentum in the region. For fossil fuels the following picture emerges: the production of gas tripled in Bolivia between 2000 and 2008. In the entire region the output of crude oil increased from 400 billion to 570 billion cubic metres between 1990 and 2008. The increase in the output of mining is especially discernible in Brazil, Chile and Ecuador.²⁰ In agriculture output is most obvious in the production of soybeans, which more than doubled between 2000 and 2007. Almost half of the global production of soybeans takes place in Latin American countries.²¹ This suggests that the current boom in raw materials is not only caused by increases in the value of primary export goods. A quantitative dimension is also present. Both developments highlight the consolidation of the extractive, 'fossilistic', agro-industrial growth model in Latin America – which is taking place despite the recent renaissance of debates on the ecological limits and planetary boundaries of growth. Correspondingly more than a third of direct foreign investment in the region during the past decade went into raw materials and agriculture.²²

If we relate the export figures and the absolute volume of extraction to the total output of the respective economy (GDP), we can observe a clear tendency toward economies of extraction, diverging national developments notwithstanding.

As a result of the methodological issues discussed earlier, identifying the share of extraction rents in the national budget is no easy task. The amount of public revenue coming from resource rents is unclear. Most existing studies focus on a single product or branch such as oil or mining. Nevertheless, analyses attempting to identify the share of revenue from rent in Latin American national budgets (eg revenue from nationalised industries, taxation and concessions) tend to be unambiguous. The share is consistently high, and not just in countries with traditional economies of extraction such as Venezuela and Bolivia. In many other countries it increased substantially between 1990 and 2008: from 28% to 34% in Chile; from 8% to 18% in Colombia; and from 30%

Table 1. Share of primary goods in total exports (%).

Selected countries	2000	2011
Mexico	16.5	29.3
Argentina	67.6	68.5
Uruguay	58.5	74.3 ^a
Brazil	42	66.2
Ecuador	89.9	92
Peru	83.1	89.3
Venezuela	90.9	95.5
Bolivia	72.3	95.5
Colombia	65.9	82.5

Note: ^aThis figure is from 2010.

Source: CEPAL, *Anuario Estadístico De América Latina y el Caribe*, 2012, 101, table 2.2.2.1.

to 37% in Mexico.²³ In the case of Ecuador the economist Pablo Dávalos estimates the share of the oil rent in the national income between 2007 and 2012 at over 40% (see Table 2).²⁴

These and other indicators prove empirically the drift of consolidating extractivist strategies in Latin America. In general three different regional dynamics are predominant:

- (1) The Andean states traditionally show a very high share of ‘pure’ rents from raw materials: Ecuador and Venezuela (oil), Peru and Chile (mining) and Bolivia (gas).
- (2) Some South American countries have a more diversified internal economic structure, so their extractive sectors are relatively smaller but becoming more important. This can be observed in Argentina in agriculture and mining and is to be expected in Brazil with the discovery of new oilfields.
- (3) The dynamics in Central America and Mexico are still different; consequently, they do not focus on extraction to the same degree. Even so, both areas are still moving in this direction.²⁵

In summary, empirical evidence for the existence of raw material extractivism is abundant. But we must still ascertain whether extractivism forms the basis of a new development project.

Latin America is widely known to have the highest social inequality rates in the world.²⁶ These inequalities not only involve income inequality, but also inherited unequal access to public goods (eg education, social security, health, water and land), and political decision making based on ethnicity, age, gender and class.²⁷ If viewed from the standpoint of social policy or development policy, political strategies that successfully address the persistent effects of colonialism will meet with broad approval and be seen as credible.²⁸

At first glance socio-structural change in the region seems to confirm a positive trend: by 2010 poverty rates in most countries in the region had decreased to their lowest levels in 20 years; on average ‘only’ a third of the

Table 2. Share of the primary sector (agriculture, forestry, hunting and mining) in GDP (% nominal prices).

Selected countries	2000	2011
Mexico	10.3	13.1
Argentina	7.2	12.8
Uruguay	6.2	8.7
Brazil	6.4	6.8
Ecuador	23.5	21.6
Peru	13.0	16.8
Venezuela	21.9	32.3
Bolivia	20.3	21.1
Colombia	15.9	13.8

Source: CEPAL statistical publications as at June 6, 2013. http://estadisticas.cepal.org/cepalstat/WEB_CEPAL_STAT/PublicacionesEstadisticas.asp?idioma=i.

population now lives in poverty.²⁹ At the same time a slight broadening of the middle class has taken place, attended by a marked upward mobility. In Brazil alone this has affected 15 million people.³⁰ These changes have resulted in a discrete decrease in income inequality, yet the region still holds the top spot in global inequality rankings.³¹

Labour market and social policy interventions are two key drivers of these trends. By 2010 social expenditure from GDP had increased to a remarkable 20% in many South American countries and up to 30% in others. Wages increased over the same period.³² As a result, the welfare state in Latin America has expanded considerably. This has gone relatively unnoticed in the Western world, which is still mostly concerned with welfare state restructuring and retrenchment. However, most of the benefits appear extremely regressive if their redistributive effects are assessed.³³ In Europe transfer payments have reduced income inequality by a third; in Latin America their effect has been limited. It is mostly formally employed people with social security and thus higher incomes who benefit from transfer payments. Only about 10% of these payments go to the poorest fifth of the population.³⁴

In the past decade this social policy has rarely been questioned, regardless of the political orientation of respective governments. In many cases traditional welfare systems were supplemented with new programmes, so-called conditional cash transfers, which have redirected resource transfers to the poorest people and have become one of the key instruments for combatting extreme poverty.³⁵ Depending on the country, an impressive percentage of GDP is invested to make benefits available (0.8% in Ecuador, 0.4% in Brazil and 0.2% in Argentina). Nevertheless, this share of social expenditure remains relatively small.³⁶

The results of labour market policies are similarly ambivalent. Today informal employment is seen as one of the main sources of inequality, with gendered, ethnic and geographic disparities being particularly striking.³⁷ Over the past ten years, real wages in the region have increased; the formalisation of work in countries such as Argentina and Brazil has grown noticeably, and registered unemployment has fallen to an all-time low. Nevertheless, governments have not succeeded in decreasing informal employment to less than 50% of all employment. Today many employees are badly paid and work without social security.³⁸ Clearly, one of the key sources of inequality has not been handled properly. This is exacerbated by the fact that extractive economies are often enclaves. And, depending on the sector, they do not tend to create much (formal) employment in general.³⁹

Regarding the third political lever used to address the social question – a redistributive tax system – the statistical trends are clear. Between 2000 and 2011 tax revenue as a share of GDP in the region increased from 15.4% to 19.1%.⁴⁰ However, only a few countries in the region have reached a level of taxation that conforms to their degree of economic development. Furthermore, tax revenue is primarily dependent on economic cycles. This has to do somewhat with the fact that the wealth of economic elites is usually not taxed – even under progressive governments. In the 1990s the revenue obtained from taxing the elites scarcely increased. In 2008 it was as little as 4% of total tax revenue. Over the same period value-added tax – which is particularly burdensome for poorer classes – increased by a third, to 36%, and became the most important

source of tax revenue in the region.⁴¹ Despite democratic majorities, no progressive government in the region has taken serious steps towards redistributing the tax burden and thereby addressing the social question. A more effective taxation of the middle and upper classes is non-existent. With one of the lowest tax burdens in the world, Latin America remains a global tax haven for the rich.

For nearly a decade three different patterns of development, all based on raw material extraction, have been observed. The first has been prevalent in countries such as Colombia and Chile, which tend to have conservative governments and where the state promotes raw material extraction. In such countries transnational corporations remain key players in the economy, and social policy continues to be secondary. The second pattern can be found in Andean countries such as Bolivia and Venezuela, where fossil energy sources and minerals are abundant and the state has become the key driver of extraction-based expansion. Here governments have appropriated the lion's share of revenue from extraction and initiated the expansion of social programmes. The third pattern is visible in countries like Argentina and Brazil, which have for a long time had diversified economic structures, industrial sectors and economic 'steering' through state institutions. These countries have recently re-embraced raw material extraction and have expanded their welfare and wage policies accordingly. In other words, many Latin American governments have used extraction revenue for social purposes and national development. In our view current economic performance in the region can be interpreted as a reflection of a new project of development or a 'development equilibrium'. Without question empirical evidence for the existence of (neo-)extractivism as a development project abounds.

Raw material extraction and development: blessing or curse?

What are the implications of these findings for development theory? Empirical evidence for Latin American (neo-)extractivism shows that traditional mechanisms of distribution operating through the labour market and social policy have been supplemented with new programmes aimed at battling poverty. At the same time Latin American governments seem to have refrained from using redistributive policies, indicating that they have merely recalibrated the distribution of extra income from extraction rents. In most countries in the region tax reforms targeting wealthy asset-owners and land reforms establishing more egalitarian access to land are lacking. The social change in the region is the product of an 'elevator effect' – almost all social groups are moving up, but the structural composition of society remains the same. Rents from natural resources may have been nationalised, but the economic elites have managed to retain their wealth. The middle classes profit from this process, however: they are growing in size, their incomes are increasing and they are emulating Western patterns of consumption and lifestyle. Certain sections of the lower classes are also benefiting but to a lesser degree. They are supported by supplementary measures aimed at reducing poverty.

Wherever this distributive equilibrium is based mostly on extraction rents, four significant problems emerge:⁴²

- (1) Even under ideal conditions for political reforms (consolidated democracy plus economic prosperity), the political elites usually refrain from using policies of redistribution that would boost social integration and participation. This suggests that the long-term social and political potential of (neo-)extractivism remains limited.
- (2) A new consensus may have emerged, but it is based on sharing the spoils, not solidarity. Such a configuration lacks balancing mechanisms and tends to be conflict-ridden in times of crisis.
- (3) The emergence of crises is quite likely. Despite international demand for raw materials, extraction revenue still depends on economic cycles, which means that abundance is not guaranteed. In the absence of a solid economic foundation based on productivity, entire classes can experience sudden severe drops in income.
- (4) Extractivism is based on the over-exploitation of non-renewable raw materials and agricultural land. In other words, it is undermining its own foundation. The global expansion of lifestyles based on the intensive consumption of raw materials magnifies this problem.

Since the 1990s many authors have argued that there is a ‘resource curse’. Such authors view the long-term prospects of rent-based economies unfavourably. They point out that we are dealing with economic bases of (re-)production built not on labour but on the commodification of nature, which requires little in the way of investment, development of an internal economy or an increase in productivity.⁴³ The export revenue of rent-based economies may be impressive, but such economies constantly threaten to produce over-valued currencies, which make the domestic industrial and service sectors less competitive and imported industrial goods cheaper. This dynamic of development has been called the ‘Dutch disease’: countries seem to drown in their wealth because they are not able to swim (or are unwilling to learn how). Their one-sided, raw materials-based development strategies can suddenly fail dramatically.⁴⁴

However, several studies on rent-based economies have recognised that rents not only occasion specific economic laws but also have a social and political dimension. Their political effectiveness depends heavily on their political-institutional embedding. After all, access to rents is relatively open in principle, which means that the appropriation of rents is primarily a political issue, not an economic one.⁴⁵ Fernando Coronil said that, in capitalist market economies, ‘the business of politics is business’,⁴⁶ which means that the state sets the parameters of capitalist accumulation. In economies of extraction, in contrast, ‘the business of business is politics’, which means that power, status, privileges and wealth primarily depend on access to the state, which provides access to extraction rents.⁴⁷

Against this backdrop Hossein Mahdavy coined the phrase ‘rentier state’, with reference to the Middle East and North Africa. Employing this concept, economies of extraction can be analysed from a state-centred perspective.⁴⁸ Some key insights thus produced are that rentier states tend to (a) entrench economically inefficient structures; (b) strengthen authoritarian patterns at the political level; and (c) spark fierce and violent conflicts in times of crisis.⁴⁹ The

authoritarian facet is the result of rentier states creating their own material base primarily by controlling resource extraction and appropriating rents, which also means that they can operate at a relative distance from their own social base. Obviously this reinforces the interest of political elites in rent-seeking: they can now transform themselves into a 'state class',⁵⁰ whose political decision making is restricted to managing the tension between defending its own privileges and addressing the issue of legitimacy. This class secures its political domination through corruption, patronage and other social policy-based forms of transfer that benefit its client groups.⁵¹ If these techniques cannot be used or if they do not work, the state class resorts to authoritarianism and repression. In cases where social groups of similar strength compete over rents, conflicts become quite probable.

However, recent studies have questioned the existence of a causal link between economies of extraction and authoritarianism. Undoubtedly different cases diverge considerably. Accordingly scholars are currently more interested in identifying the endogenous and exogenous factors that cause and sustain the different dynamics of development in different economies of extraction. They are focusing on the 'rent dependency' of the state, specific forms of rents, the configuration of political institutions, and the regional embedding of the economy.⁵²

Because we are dealing with democratic regimes in almost all cases, applying this analysis to (neo-)extractivism in Latin America has its limits. Nevertheless, it can serve as a starting point. Focusing on the state's share in rents from a small range of primary goods, one can say that various countries in Latin America display features of the rentier state. Around 2005 state revenue from oil was slightly under 40% in Mexico, between 60% and 70% in Ecuador and Venezuela, and close to 10% in Argentina. Similarly revenue from mining was 10% in Peru and 20% in Chile, the 'model student' of neoliberalism.⁵³

However, the 'extractivist' states in twenty-first century Latin America differ in many respects from 'typical' rentier states. Liberal democracy has been consolidated for three decades. Political competition exists, and political elites are replaced from time to time – even if authoritarianism is on the rise in some states.⁵⁴ So far a dominant state class capable of entrenching its own position has not developed. Further research is necessary to determine whether Latin American (neo-)extractivism amounts to a reversal or a variance of rent-based dynamics of development. This is relevant for analyses of the 'rentier state' because, until now, these have barely addressed the question of democratic legitimacy. The existence of expansive labour markets and social policies in the region can be interpreted as an attempt by the political elites to produce legitimacy and at the same time to defend the extraction model.⁵⁵

Two insights from studies of rentier states are useful for future analyses of Latin American (neo-)extractivism: First, political alliances based not on a comprehensive form of social cohesion but on 'sharing the spoils' of raw material extraction weaken institutional legality and democratic institutions. Progressive governments in Latin America, which have been trying to increase social participation in the region with the help of raw material extraction for more than a decade, could become the gravediggers of democracy – the form of political rule that brought them into power.

Second, recent accounts of the rentier state assume that the institutional framework of rent-based societies is primarily context-dependent. Therefore, contextualised approaches of analysis that take into account, in a relational way, subject and economic, ecological, political and social aspects are greatly needed. In this context, some key questions are:

- How can the quantitative increase in revenue from rents be transformed into a qualitative form of redistribution and a permanent expansion of social rights, formalised employment and stable social participation? And how can we ensure that the transformations required conform to the exigencies of democracy and sustainability?
- How should extraction societies treat the territories that possess their reproductive bases, which are essential for their own existence, and approach the issues of representation, recognition and redistribution?

A shift in perspective is required to develop an analysis of this type systematically. Despite more recent debates, rent-theoretical approaches are mostly state-centred, which means that they mainly examine macro-indicators and -institutions, while neglecting both the spatial dimension of development and the dialectics between the appropriation of nature and social relations of domination.⁵⁶ The political ecology tradition offers a series of ideas on how to close this methodological gap.

The political ecology of (neo-)extractivism and the spatial restructuring of political domination

As a development project (neo-)extractivism is based on the appropriation of nature. It aims to turn nature into a viable commodity in the world market. In order to extract nature from its spatial contexts and to detach it from its social meanings, a number of technical, institutional and political preconditions must be met.⁵⁷ Parties must identify marketable natural elements (ie exploration), tap these resources and exploit them. If we look only at the figures for new mining concessions in Peru and Colombia, we notice how quickly this is happening.⁵⁸ Furthermore, legitimate rights of access and exploitation must be decided, ie property rights, concessions or 'rights of temporary use' (leaseholds). Processes of extraction tend to result in ecological destruction, which is initiated by the appropriation and administering of nature. They also lead to the emergence of new forms of social exclusion and the modification of social relations. The exploration and exploitation of new gas and oil fields in the Amazon Basin or of hard coal and gold mines in the Andes require the protection of rights of access. They necessitate a redistribution of rights in respective societies, which also means a transformation of social relations of domination – at least insofar as these social relations concern a concrete piece of land or forest. This suggests that national development models based on raw material extraction are constantly producing new social structures determining economic success or failure. Against this backdrop the reason the spatial expansion of the extractivist model within societies is a conflict-ridden process becomes understandable. The areas of extraction and the land used for the production of agro-industrial export

goods are not (as is often claimed) deserted regions or unused and degraded surfaces. The truth is quite the contrary. The right to use and exploit nature collides with formal-legal arrangements or customary practices favouring subaltern (and often indigenous) groups.

Benefitting from these widely used starting points in political ecology, we are able to identify the socio-ecological conflicts that typify (neo-)extractivism and their implications for social and development policy. Within political ecology conflicts over access, control and use of nature are understood as distributional clashes and clashes of recognition between different social groups. Nature is not seen as an external force independent from social structures and human activity. Rather, nature has a social and cultural dimension, and is the object of political struggles. Scholars working in this area 'seek [...] to understand the complex relations between Nature and Society through careful analysis of social forms of access and control over resources'.⁵⁹ Political ecology uses categories such as actor, power, access, control, space, identity, distribution, social practice and knowledge. In so doing, it provides a tool-kit for the analysis of social conflicts and the transformations generated by changes in access to nature and control over it.⁶⁰

Applying this analytical tool-kit to (neo-)extractivism involves looking at the social appropriation of nature *as a process* and taking into account positions of power and the interests of actors. From this it becomes possible to interpret shifts in power relations in conjunction with the political economy of (neo-)extractivism. The actors facing one another in conflicts are mostly subaltern collectives such as indigenous groups or small farmers on one side and the state (or an alliance of state and non-state actors) on the other. We can identify the conflicting interests of these groups by asking two questions: 1) Who decides, *de jure* and *de facto*, over the use and appropriation of land? 2) Who is able to legitimise their use of land – the nation in the sense of an imagined national community of citizens or indigenous communities exercising their right of territorial self-determination?

Often, the damage done by extractivism precedes conflict. The environmental destruction caused by large-scale mining, agro-industrial plantations and oil exploitation tends to undermine support from the people favoured by this development model – in particular, the numerous rural poor. This is especially true if improvements in public welfare are accompanied by ecological problems that pose an existential threat to people's livelihoods. The dynamics of development produced by extractivism lead to the emergence of new social divisions and to the transformation of social compromises.⁶¹

(Neo-)extractivism should be seen not only as a national development project but also as a process of internal spatial transformation connected to a political power shift. In economies of extraction power results from control over nature, in particular, over its marketable elements. It reflects the command of a specific social group over territories of extraction.⁶² In short, a process of 'internal territorialisation' amounts to a 're-spatialisation' of political power.⁶³ Its key instruments are enclosures, privatisation and land-use planning, which all contribute to creating new mechanisms of inclusion and exclusion. Consequently the production of 'territories of extraction' is recalibrating the political field. The liberal dictum of political-legal equality and of social rights for indigenous and

black social groups, which is enshrined in many of the constitutions in the region, is increasingly under pressure. This is unsurprising, given that the recognition of differences, political equality and local-territorial autonomy limits expansion instigated by extractive production.

Future debates on (neo)-extractivism should consider that the evaluation of raw materials-based development models requires analyses at the sub-national level that are sensitive to social differences and that focus on concrete social practices, processes of extraction, and the appropriation of rents from raw materials. Conducting a state-centred examination of macroeconomic and socioeconomic indicators is not enough. We need to find out who is capable of asserting their interests at the political level when rents are distributed; who is carrying the risks and the burden of raw materials-based development; who decides, at the political level, on extraction; how decision making is structured; and what the consequences of all this are for democracy. Furthermore, we need to analyse who is 'territorialising' land and what their aims are; who is creating new frontiers, and who is included and excluded in the process.⁶⁴

If focused on these points, our analyses will overlap with recent studies of the approaches of rentier states, in particular, Kenneth Omeje's work on 'rentier space': 'The "rentier space" discursively subsumes and upholds activities related to the acquisition and control of rentier resources in a state, including the disposition, appropriation and utilization of any accruable funds, prerequisites, dividends and opportunities'.⁶⁵ Omeje locates the state, and the 'rent elites' controlling it, in the epicentre of this space. But he also considers the social forces that politically challenge the patterns of accumulation and distribution existing in the 'rentier space'. Briefly stated, the 'rentier space' is an arena of social conflict where struggles are taking place over the distribution of rent, the form of its production and the dominant development path of society.

(Neo-)extractivism in Latin America: the emergence of a new development model for the twenty-first century?

Our article has shown that the current, mostly Latin American debate on (neo-)extractivism can be supported empirically and arranged theoretically. In the area of rent theory it suggests that patterns of democratic legitimation should be more closely studied more. Moreover, it demonstrates that certain key concepts in development theory, such as the economy, the state and democracy should be linked more closely to rent, which is a concept that was neglected in the past decade. Similarly political ecology highlights the fact that the internal dynamics of societies and the reordering of political domination should be discussed in conjunction with relations between society and nature. Such a broadened perspective can provide us with important clues regarding social inequality, power relations and their ecological impact. Moreover, it helps us understand that destructive practices and shifts in the rights of use inscribe social relations of domination into nature, and that the transformation, appropriation and control of nature are contributing to the constitution of domination. Currently the actors, places and material structures driving development in Latin America seem to be undergoing a profound transformation, caused by the rise of extraction economies. The field of nature (or the environment) is not external to society, but is

contested and politicised. How nature is appropriated, exploited and used; who uses it and for what purposes are questions that cannot be answered by simply referring to a set of laws governing society. Nature is an object of social conflict and of processes of deliberation within society.

Thanks to (neo-)extractivism Latin America could become, once again, a laboratory for development projects in the future. The global hunger for raw materials suggests that economies of extraction will soon gain in importance in other regions of the global South. Participants in current debates on development would be well-advised to look more closely at the issue and to take inspiration from the debate emerging out of Latin America.

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Notes

1. The term ‘extractivism’ (derived from the Latin word ‘*ex-tractum*’) refers to the extraction of raw materials. It is usually used to describe economic models and sectors such as mining that revolve around the extensive extraction of raw materials and their export. Correspondingly ‘neo-extractivism’ is associated with a specific mode of development where the receipts from exports of primary goods are invested in social development and are used to widen social participation. For an overview, see Gudynas, “Extractivones, Extractivismos y Extrahecciones.”
2. See Fraser and Larmer, *Zambia, Mining and Neoliberalism*; Bridge, “Global Production Networks”; and Bridge, “Mapping the Bonanza.”
3. The extraction of raw materials such as oil, gas, copper, gold and silver has been a key feature of the political economy of Latin America for a long time. The history of the region is a history of extractivism. Both in colonial times and after the establishment of independent national states in the early 19th century Latin America was an important source of raw materials supplied to industrialising countries in Europe. The exploitation of raw materials in Latin America was not just a foundation for development in Europe. It was also a determinant in the shaping of social relations in Latin America. See Galeano, *Las Venas Abiertas*.
4. Important sources are CEPAL, *Latin America and the Caribbean in the World Economy*; and CEPAL, *Panorama de la Inserción Internacional*, 2011, 2012.
5. See IBD, “Crecimiento Económico y Recursos Naturales”; Sinnott et al., *Natural Resources in Latin America*; and Reid, “So Near and yet so Far.”
6. Gudynas, “Diez Tesis Urgentes sobre el Nuevo Extractivismo.”
7. OECD, “Towards Green Growth”; and UNEP, *Towards a Green Economy*.
8. Maggio and Cacciola, “A Variant of the Hubbert Curve.”

9. Roache, *China's Impact on World Commodity Markets*.
10. HWWI, "HWWI-Index der Weltmarktpreise."
11. This dynamic is reinforced by attempts at the international level to regulate climate change and other environmental problems with the help of market-based instruments that lead to the commodification of nature. Commodification invites financial speculation and thus leads to price increases in natural goods such as land. See, for example, Sassen, "Land Grabs Today"; and Fairhead et al., "Green Grabbing."
12. See Bárcena, "Desafíos y Oportunidades para el Rol del Estado"; Iglesias, "Economic Paradigms and the Role of the State"; and Sinnott et al., *Natural Resources in Latin America*.
13. Svampa, "Resource Extractivism and Alternatives."
14. See Fairhead et al., "Green Grabbing"; and Peluso and Lund, "New Frontiers of Land Control."
15. See Acosta, "Extractivismo y Neextractivismo"; Bebbington, *Social Conflict*; Gudynas, "Estado Compensador y Nuevos Extractivismos"; Haarstad, "Extracting Justice?" Lang and Mokrani, *Más Allá del Desarrollo*; Veltmeyer, "The Political Economy of Natural Resource Extraction" for an overview of the debate. The participants in the discussions on raw materials-based development do not simply offer analyses and critiques of the model; they also develop alternatives. These either consist of alternative development strategies or 'alternatives to development'. Key reference points are the notion of a 'good and fulfilled life' ('buen vivir') and the commitment to 'post-extractivism'. See, for example, Acosta, *El Buen Vivir*; Cortez and Wagner "'El Buen Vivir'"; Gudynas, "Postextractivismo y Alternativas al Desarrollo"; and Walsh, "Development as *Buen Vivir*."
16. CEPAL, *Panorama de la Inserción Internacional*, 2010, 17.
17. CEPAL, *Anuario Estadístico de América Latina y el Caribe*, 2012.
18. Costa Rica, El Salvador, Guatemala, Honduras and Nicaragua.
19. All figures are from CEPAL, *Anuario Estadístico de América Latina y el Caribe*, 2012, 101.
20. CEPAL, *Anuario Estadístico de América Latina y el Caribe*, 2011; and Bebbington, "Underground Political Ecologies."
21. All numbers from CEPAL, *Anuario Estadístico de América Latina y el Caribe*, 2011.
22. Bebbington, "The New Extraction," 15.
23. Jiménez and Tromben, *Política Fiscal en Países Especializados*; and Kacef and Jiménez, *Políticas Macroeconómicas en Tiempos de Crisis*, 69.
24. Dávalos, "Las Falacias del Discurso Extractivista," 6.
25. For an overview, see Matthes, *Eine quantitative Analyse des Extraktivismus*.
26. CEPAL, *Panorama Social de América Latina* 2011, 14–15.
27. Lopez and Pery, *Inequality in Latin America*.
28. Burchardt, "¿Democracia Desigual o Desigualdad Democrática?" and Burchardt, "¿Por qué América Latina es tan Desigual?"
29. CEPAL, *Panorama Social de América Latina*, 57.
30. Souza et al., *Os Batalhadores Brasileiros*.
31. Lustig et al., "The Decline in Inequality," 18; and CEPAL, *Panorama Social de América Latina*, 23–24.
32. CEPAL, *Panorama Social de América Latina* 2011.
33. Segura-Ubierno, *The Political Economy of the Welfare State*.
34. Goñi et al., *Fiscal Redistribution*.
35. See Barrientos, "Accounting for Change"; and Barrientos, *Social Assistance in Developing Countries*.
36. CEPAL, *Panorama Social de América Latina*.
37. Tokman, *Informality*.
38. CEPAL, *Panorama Social de América Latina* 2011; and OIT, *Panorama Laboral* 2011.
39. See, for example, Delgado Ramos, "Extractivismo Minero," 74; Chacaltana and Yamada, *Calidad del Empleo*; and Arze and Gómez, "Bolivia," 127–154.
40. CEPAL, *Panorama Fiscal de América Latina*, 12.
41. Kacef and Jiménez, *Políticas Macroeconómicas en Tiempos de Crisis*, 66ff.
42. The concept of 'rent' figures heavily in the works of the classical political economists (Adam Smith, David Ricardo and Karl Marx). It refers to a form of disposable income whose source is neither labour nor investment.
43. For an overview, see Rosser, *The Political Economy of the Resource Curse*.
44. See Karl, "Oil-led Development"; and Ross, *The Oil Curse*. For a critical account, see Brunnschweiler and Bulte, "The Resource Curse Revisited."
45. Karl, *The Paradox of Plenty*.
46. Coronil, "'It's the Oil, Stupid!!!,'" 19.
47. Karl, "Oil-led Development," 661.
48. See Mahdavy, "The Pattern and Problems of Economic Development in Rentier States." See also Beblawi and Luciani, *The Rentier State*; and Dauderstädt and Schildberg, *Dead Ends of Transition*.
49. Basedau and Lay, "Resource Curse or Rentier Peace?" and Ross, *The Oil Curse*.
50. Elsenhans, *State, Class and Development*.
51. As long as systems based on state-centred clientelism have sufficient resources at their disposal, the elites have little interest in formalising and institutionalising social policy. After all, this could threaten the legitimacy of their rule. If the institutionalisation of social policy is limited, a configuration tends to

- emerge where the dominant strategy of controlling social action consists in client-based relationships and loyalty to the state. See Gough and Wood, *Insecurity and Welfare Regimes*.
52. See Beck, "Der Rentierstaats-Ansatz"; Mehlum et al., "Institutions and the Resource Curse"; and Ross, *The Oil Curse*.
 53. Campodónico, "Renta Petrolera y Minera."
 54. See Castañeda, "Latin America's Left Turn"; and Weyland, "The Rise of Latin America's Two Lefts?"
 55. This is confirmed by the fact that many social programmes (eg the missions in Venezuela) are characterised by their 'assistentialism' and clientelism: often benefits are provided in paternalistic manner, not as social rights or as impersonal transfers provided by the state. For more general accounts, see Barrientos and Santibáñez, "New Forms of Social Assistance"; and Lustig et al., "The Decline in Inequality in Latin America."
 56. See McNeish, *Rethinking Resource Conflict*.
 57. Altvater, "Der Unglückselige Rohstoffreichtum."
 58. Rudas, "Regulación Minera y Regulación Ambiental."
 59. Watts and Peet, "Liberating Political Ecology," 4.
 60. Political ecology is not a coherent theoretical school. It includes numerous approaches diverging in terms of their disciplinary backgrounds and theoretical assumptions (eg structuralism, feminism, post-structuralism, actor-centred analyses). What they have in common is that they reject apolitical explanations for environmental problems that simply focus on poverty or population growth. Accordingly, they speak of a 'politicised environment' and see environmental problems and struggles as distributional conflicts between different social groups. For these approaches environmental questions are linked to categories referring to social structures and different forms of power. For an overview, see Alimonda, *Los Tormentos de la Materia*; Bryant, "Political Ecology"; Palacio Castañeda, *Ecología Política de la Amazonia*; Robbins, *Political Ecology*; Bryant and Bailey, *Third World Political Ecology*; and Paulson and Gezon, *Political Ecology*.
 61. Gudynas, "Der Neue Progressive Extraktivismus," 51.
 62. See, for example, Coronado and Dietz, "Controlando Territorios, Reestructurando Relaciones Socio-ecológicas."
 63. Vandergeest and Peluso, "Territorialization."
 64. Belina, *Raum*, 89.
 65. Omeje, "Extractive Economies and Conflicts in the Global South," 10.

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