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ANALYTICAL ESSAY

Toward Global IPE: The Overlooked Significance of the Haya-Mariátegui Debate

Eric Helleiner
University of Waterloo

AND

Antulio Rosales
University of Oslo

Building on this journal's recent debates about the need for "global" international relations (IR), this article calls attention to the overlooked significance of two important Latin American thinkers from the interwar years: Víctor Raúl Haya de la Torre and José Carlos Mariátegui. We argue that the study of their thought—and the debates between them—has much to contribute to current efforts to build a more global international political economy (IPE) whose classical intellectual foundations are less dominated by American and European scholarship. Through a detailed analysis of their thinking, we show how Haya and Mariátegui generated some highly innovative ideas about many IPE issues including the following: the negative impacts of imperialism on their region; the roles of class, race, culture, and indigenous peoples in anti-imperialist politics; the relationship of imperialism to the stages of capitalism; the regulation of foreign investment, economic regionalism, and the Eurocentric biases of IPE thought. We show how many of their ideas foreshadowed the better-known postwar Latin American contributions to IPE of structuralism and dependency theory in ways that have not been fully recognized. We also suggest that their critique of Eurocentrism served as an early precedent for the kind of global IPE that many are seeking to build in the current era. For these reasons, we argue that their work deserves much more recognition from contemporary IPE scholars than it has hitherto received and inclusion among the cannon of classical literature that forms the foundations of the field.

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This journal has recently encouraged an important debate about the need for international relations (IR) to become less dominated by American and European scholarship (ISR 2016). Participants in that Global IR debate may not

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be aware that their discussions have been paralleled by similar calls for a greater global conversation within the field of international political economy (IPE) (e.g., Blyth 2009; Cohen 2013; Hobson 2013; Phillips 2009; Tussie and Riggirozzi 2015). These calls have emerged largely in response to Cohen's (2008) history of the IPE field, a history that highlighted the dominance of a British and American school in the contemporary IPE scholarship.

While the Global IPE discussions share similarities with the Global IR debate, they have made less progress to date in transforming the classical foundations of IPE thought. To be sure, the European/American dominance of pre-1945 classical IPE thought has been well demonstrated and effectively critiqued (e.g., Blaney and Inayatullah 2010; Hobson 2013). But IPE scholars have been slower than IR scholars to identify theorists beyond these regions who can help broaden the classical intellectual foundations of their field. The teaching of pre-1945 classical IPE continues to focus narrowly on European and American intellectuals who pioneered the three dominant perspectives of economic liberalism (e.g., Adam Smith, David Ricardo), economic nationalism (e.g., Alexander Hamilton, Friedrich List), and Marxism (Karl Marx and the European theorists of imperialism).[1]

This article seeks to help widen the classical intellectual cannon of IPE by calling attention to some important Latin American ideas from the interwar years. Of course, Latin American contributions to IPE thought *after* World War II are already well known. During the 1950s and 1960s, a number of thinkers from the region famously challenged liberal understandings of global economic dynamics through the development of structuralist ideas and dependency theory. The prominence of these two lines of critique ensured that Latin Americans such as Raúl Prebisch, Theotonio Dos Santos, Celso Furtado, Fernando Cardoso, and Enzo Faletto gained worldwide recognition and remain central to a global intellectual history of IPE thought in the postwar period (e.g., Cohen 2013).

By contrast, very little attention is given to Latin American contributions to classical IPE thought before World War II. As Paul Gootenberg (1993) has noted, the region is usually seen more as a consumer of European classical economic thought—particularly liberal thought—than as a generator of independent innovative ideas throughout the nineteenth and early twentieth centuries. Indeed, he points out that Latin American intellectual elites are often criticized for slavishly embracing European ideas about free trade and investment and failing to develop a more critical set of ideas about IPE issues that was tailored to the region's needs. From this vantage point, the emergence of structuralism and dependency is seen as the rise of the first regionally distinctive perspective on IPE issues.

Gootenberg (1993) himself has provided an important critique of this perspective by highlighting a number of Latin Americans in the nineteenth century who developed innovative analyses of IPE issues. This article builds on his critique by focusing on the IPE thought of two other Latin American thinkers from the interwar period: José Carlos Mariátegui and Víctor Raúl Haya de la Torre. Haya and Mariátegui developed some very distinctive ideas—partly in the context of disagreements they had with each other—about a range of IPE issues. The unique nature of many of their ideas emerged from the fact that they engaged with European theories of imperialism with the context of their own region in mind. We argue that their ideas deserve wider recognition as important Latin American contributions to the classical IPE thought that predated those of structuralism and dependency theory.

Through a detailed study of each thinker's ideas, we show how Haya and Mariátegui developed distinctive analyses of many issues including the following:

[1]Although the term *IPE* was not widely used before the 1970s, these classical political economists are described as classical IPE scholars because their analyses of international economic relations laid the foundations for the modern field of IPE.

the negative impacts of imperialism on their region; the roles of class, race, culture, and indigenous peoples in anti-imperialist politics; the relationship of imperialism to the stages of capitalism; the regulation of foreign investment, economic regionalism, and the Eurocentric biases of IPE thought. We highlight how many of these ideas foreshadowed the thinking of Latin American structuralist and dependency thinkers after 1945 in ways that have not been fully recognized. We also suggest that their critique of Eurocentrism served as early precedent for the kind of global IPE that many are seeking to build in the current era. For these reasons, we argue that the significance of their work deserves much more recognition among contemporary IPE scholars than it has hitherto received.

The IPE Ideas of Haya de la Torre

Both Haya and Mariátegui developed their ideas in the context of engaging with European Marxist theories of imperialism. Before World War I, anarchist ideas had much more influence on the Latin American political left than Marxism (e.g., Love 1990, 83; Einaudi 1966, 18). But this situation began to change when the Russian revolution triggered new interest in Marxist thinking in the region. As Meschkat (2008, 41) puts it, "an entire generation of intellectuals, mostly journalists, writers, and lawyers, welcomed the October Revolution as the beginning of a new era." Haya and Mariáegui were key members of this generation. Because some of Mariátegui's key ideas were developed in reaction to Haya's thinking, we will begin with the latter.

Haya is much better known for his long political career than for his IPE thought. Born into a prominent family in the northern Peruvian coastal town of Trujillo in 1895, Haya emerged during his university years as a top leader in the Peru's student movement. He became particularly interested in the university reform movement, becoming the first head of the González Prada Popular University in Lima in 1921. Created by radical Peruvian students, this institution had been named after Manuel González Prada, a Peruvian thinker who had strongly criticized Peruvian elites before his death in 1918 (and whose ideas had influenced Haya in his youth) (Pike 1986, 28, 43). In 1923, Haya was imprisoned and then exiled after he led a student-labor protest that was brutally repressed by Augusto Leguía's regime.

Haya's interest in imperialism appears to have been piqued by his travel at this time to Mexico via Panama and Cuba.[2] In the first article he wrote in December 1923 from Mexico, he wrote that "the consciousness of the imperialist danger of the United States is new to me . . . To approach Central America, Mexico, or the Antilles is sufficient to produce immediately deep reflections on the nasty problem which is progressively affecting the destinies of our America. The specter of oppression presented the visitor is like an overwhelming revelation" (quoted in Einaudi 1966, 39). Soon thereafter in 1924, he announced the creation of the pan–Latin American political movement for which he became so well known: the Alianza Popular Revolucionaria Americana (APRA). He declared that APRA had five goals: "1) Action of the countries of Latin America against Yankee Imperialism, 2) The political unity of Latin America, 3) The nationalization of land and industry, 4) The Internationalization of the Panama Canal, 5) The solidarity of all the oppressed people and classes of the world" (Alexander 1973, 97).

Haya then actively promoted APRA's goals across the region and, by the late 1920s, APRA-related political parties had been created under various local names in at least nine other Latin American countries (e.g., Cozart 2014). His travels in this time period also took him to the United States and Europe, where he studied

[2]Klarén (1973) and Pike (1986, 24–26) also point to economic transformations linked to US investment in his hometown region as early influences on his thinking.

in Oxford and Berlin, and met with leading intellectuals and politicians on the left. In 1931, he returned to Peru to run for the presidency after Leguía's ouster. After losing that election, Haya was imprisoned for fourteen months and then went into hiding for much of the rest of the 1930s. He remained very politically active after World War II in Peru and the APRA movement until his death in 1979, although he was increasingly seen as a more conservative figure (Pike 1986; Einaudi 1966; Salisbury 1983; Cozart 2014). This article focuses only on Haya's ideas in the interwar years.

Critiquing Mental Colonialism

It was during his foreign travels from 1923 to 1931 that Haya developed many of his key ideas about imperialism. His most important writings on the subject are contained and outlined in a book titled *El Antiimperialismo y el Apra* that he wrote in 1928 (although it was not published until 1935).[3] In that and other writings, Haya was critical of those Latin Americans who saw US imperialism primarily as a political phenomenon (i.e., invasions) or a cultural one. He emphasized that the economic dimensions of imperialism were now the most important, taking forms such as "the investment of capital and the exploitation of raw materials and markets for the sale of industrial products" (Alexander 1973, 283). As he told an anti-imperialist conference in Paris in 1925, "our anti-imperialist and revolutionary generation has identified the problem for what it is, an economic conflict, purely and simply economic" (quoted in Einaudi 1966, 45).

In analyzing economic imperialism, Haya made clear that he found much inspiration in Marxism "as a philosophical doctrine" (Alexander 1973, 149). At the same time, he made clear his view that Marxist ideas needed to be adapted considerably in the context of Latin America, or what he preferred to call "Indoamerica":

> The doctrine of Apra signifies within Marxism a new and methodic confrontation of Indoamerican reality with the thesis which Marx postulated for Europe and as a result of the European reality in which he lived and studied in the middle of the last century. If we accept the fact that Europe and America are very far from being identical because of their geography, their history, and their present economic and social conditions, it is imperative to recognize that the global and simplistic application to our environment of European doctrines and norms of interpretation should be subject to profound modifications. (Alexander 1973, 149–50)

His frustrations with Eurocentric versions of Marxism were first triggered during a 1924 visit to Russia, where he encountered "almost total ignorance" about Latin America (Alexander 1973, 111, 103; Einaudi 1966, 42). He found the same at subsequent European anti-imperialist meetings, where he described the role of Latin American delegates as follows: "There they look at us as picturesque representatives of exotic regions, and ask us in set phrases the area, population, and principal cites of our countries. We make such long voyages to give kindergarten geography lessons! . . . we do not need to go to Europe to ask advice or to receive lessons in struggling" (Alexander 1973, 134).

Haya was also very critical of Latin American communists who accepted Soviet dogma, describing them as "criollo" communists who were "unthinking repeaters of an imported creed" (Alexander 1973, 150). He made a point of noting that APRA "has not submitted to, nor is it ever going to submit to the Third, to the

[3]For readers with Spanish language skills, Haya's complete works have been edited and compiled by Juan Mejía Baca in seven volumes (Haya de la Torre [1935] 1984). His pre-1939 works (the ones cited in this article) appear in volume 2 and 4. For those wanting to read Haya's ideas in English, Alexander's (1973) translation is the best source. Because *International Studies Review* is an English language journal (and in order to encourage more engagement with Haya's ideas from readers outside Latin America), we have cited from English translations of Haya's work.

Second, or whatever other political International with European headquarters; and it thus defines its status as an Indoamerican nationalist and anti-imperialist movement" (Alexander 1973, 102). His stance provoked strong criticism from Latin American communists. Indeed, it was his heated debate with Cuban communist Julio Antonio Mella at the 1927 World Anti-Imperialist Congress in Brussels that served as a key prompt for Haya to write *El Antiimperialismo y el Apra* (Alexander 1973, 150; Ameringer 2009, 103).

It is important to recognize that Haya's criticism of Eurocentrism went beyond that of Latin American Marxists:

> Political doctrine in Indoamerica is almost all European based. . .even though our historical process has its own rhythm, its typical characteristics, its intransferable content, the paradoxical thing is that we don't see it or do not wish to see it. . .. For our ideologues and theoreticians of right and left, our Indoamerican world doesn't move. For them, our life, our history and our social development are only reflections or shadows of the history and development of Europe. (Alexander 1973, 163)

In place of what he called "mental colonialism," Haya developed a theory of "historical time-space" (Alexander 1973, 164, 44). Drawing on the theory of relativity of Einstein (who Haya met in 1929), as well as new anthropological literature championing cultural relativism, Haya critiqued European theories that claimed universality based on the European experience, as well as linear European concepts of the evolution of humanity. He felt these approaches to social science overlooked how peoples in different continents developed distinctive worldviews that derived from their particular historical time-space. As he put it, "the so-called historic laws and their universal application must be conditional upon the relativity of the viewpoint. Therefore, the history of the world, seen from the Indoamerican historical space-time will never be the same as that seen by a philosopher from the European historical space-time" (Alexander 1973, 44). This line of argument served as a precedent for modern-day critiques of Western monistic universalism that are advanced by global IR scholars such as Acharya (2014, 649).

Imperialism as the First Stage of Capitalism

Haya's historical time-space theory led him to challenge Lenin's ([1916] 1970) notion that imperialism was the highest stage of capitalism. He agreed that Lenin's idea made sense from a European perspective, but he strongly rejected the idea that imperialism was the final stage of capitalism in Latin America: "in Indoamerica what is in Europe 'the last stage of capitalism' becomes the first. For our peoples, the capital which immigrates or is imported establishes the first stage of the modern capitalist age." (Alexander 1973, 106). This argument stemmed from his belief that Latin America needed to proceed through further phases of capitalism before creating a socialist society. As he put it, "before the socialist revolution can bring the proletariat to power—a class only in formation in Indoamerica—our peoples must pass through previous periods of economic and political transformation." He then reinforced the point with blunter language: "It is sad, but necessary, to break the old dreams of impossible revolutions in the European mode . . . a few modern industrial factories founded by imperialism, a few cities built on European lines, and few hundred people dressed in Paris and London fashions cannot make history skip over inescapable stages of development" (Alexander 1973, 153–54).

Haya's stage theory did not, however, reflect a view that Latin America's development trajectory would follow that of Europe simply with an historical lag. In his view, Latin America faced a very distinctive situation because imperialism had introduced capitalism into the region in a distorted form. Anticipating post-1945 Latin American theorists, he even used the term *dependent* to describe this distinctive context: "our capitalism is born with the advent of modern imperialism. It is

born, then, dependent and as a result of the culmination of the capitalism of Europe—England especially" (Alexander 1973, 283).[4] Because it served the "necessities of imperialist capitalism," Haya argued that capitalism in Latin America developed in a "slow and incomplete" manner. For example, he noted that it "does not build machinery, nor even forge steel or manufacture its lesser instruments of production" (quoted in Einaudi 1966, 61–62). Haya also highlighted the weakness of the national bourgeoisie:

> In Indoamerica we have not yet had time to create an autonomous and powerful national bourgeoisie, strong enough to displace the landowning classes ... From the beginning of our incipient national bourgeoisies, which are like the accidental roots of our landowning classes, imperialism has existed in their midst, dominating them. In all our countries before a more or less definitively national bourgeoisie develops, there enters immigrant capitalism, that is imperialism. (Alexander 1973, 106–7)

More generally, Haya noted that economic imperialism was both an "exploiting" and "conquering" force (Alexander 1973, 151). As an exploiting force, imperialism "affects our wealth, captures it, dominates it, monopolizes it. Imperialism uses wealth to subjugate our peoples as nations and our workers as exploited classes" (Alexander 1973, 123). As a conquering force, US economic imperialism undermined Indoamerican political sovereignty, particularly as US interests came to control local states via alliances with local elites. As he told a 1925 anti-imperialist assembly in Paris, the "political oligarchies which govern our people in the interest of the exploiting classes of landowners and bourgeois, are all, without exception, unconditionally subject to the orders of the White House, itself the political organ of Wall Street" (quoted in Einaudi 1966, 46).

At the same time, he warned in 1928 that imperialism "will use violence against any political or social attempt for transformation that, in the judgment of the Yankee empire, affects its interests." As US investment in Latin America grew, Haya thought the risk of intervention would grow: "The day may come when ... the United States will surround Indoamerica with walls of flame from its gigantic artillery. This would be an expensive undertaking. It is not done now because there is no need to employ so much money to defend five billion. When there are ten or twenty billion, or fifty billion, the North American position will change. Our peoples will then come to be a large Nicaragua" (Alexander 1973, 131–32).

Because of these various impacts of imperialism, Haya argued that Latin American countries could not hope to develop along the same path of earlier capitalist powers. As he put it, "before any of our countries will succeed in developing an autonomous economy, the United States will have succeeded in completely dominating its economy." Even if it was possible to develop by following the European and US model, Haya questioned the desirability of this goal: "Even when we give full play to make-believe and imagine that we shall come to form a group of capitalist powers rivaling the present empires in Europe, North America, and Asia, such an ingenious and complacent thesis would present the tragic perspective of new competition and incessant and ruinous struggle" (Alexander 1973, 156–57).

The Anti-Imperialist State and Foreign Capital

What Indoamerica needed, argued Haya, was the creation of an "anti-imperialist" state dedicated to a kind of "state capitalism." The latter was modeled on the kind

[4]He was not alone in discussing the dependent nature of Latin American economies. In *Imperialism*, Lenin noted that Argentina was in a form of "dependence" different from the status of a colony or semicolony (Caballero 1986, 66). At the Sixth Comintern Congress in 1928, in a discussion of whether or not Latin American countries were colonies, the Ecuadorian delegate Ricardo Paredes suggested the creation of a new category called "dependencies," and Caballero (1986, 72–73) notes that his idea met with "relative acceptance." As we shall see, Mariátegui used all three words—colony, semicolony, and dependency—to describe Latin America.

of economic planning that European states implemented during World War I but with the different goals of protecting the nation from imperialism, generating economic progress for the nation, and representing a transition stage on the route towards a more socialist society. As he put it, "The difference between the anti-imperialist state and European state capitalism will be based fundamentally on the fact that while the latter is an emergency measure in the life of the capitalist class, a means of security and an affirmation of the system, the anti-imperialist state will develop *state capitalism as a system of transition towards a new social organization*" (Alexander 1973, 170).

Under this system of "state capitalism," a new national "plan of economic progress" would be pursued (Alexander 1973, 186). The economy would be scientifically planned with the help of improved statistics and a reformed civil service. In order to better understand the "economic reality" of the country, advice would also be sought from an elected economic congress representing all key actors in the economy from labor and agriculture to national and foreign capital (Alexander 1973, 186). A key aspect of the plan would involve "the collaboration of the state with national production and the development of small industry which must be based on economic democracy." The state would also create an agricultural bank that would serve "as an organizer of agrarian cooperatives, as a guarantor of the indigenous communities, as a planning and technical instrument of the activities of the agrarian workers" (Alexander 1973, 189).

Haya also devoted particular attention to the state's role vis-à-vis foreign capital. The issue of how to regulate foreign investment assumed much more prominence in his writings than it received from most IPE analysis at this time. This innovative focus reflected his setting; Latin American countries were receiving rapidly growing US foreign investment in the 1920s. In addition to calling attention to the trend, Haya carved out a distinctive position on this issue that anticipated later structuralist ideas. On the one hand, he was very critical of conservative Latin American governments for allowing the unrestricted entry of foreign capital into their countries. Because of "this one-sided unconditional attitude" (Alexander 1973, 179), he argued that "the capital which has immigrated to our countries thus has not become a force for progress, a means of liberation, but rather chains of slavery" (Alexander 1973, 81). On the other hand, Haya was equally critical of radicals who urged Latin America to reject all foreign capital. In his view, the further economic development of Indoamerica required foreign capital and the kinds of modern capitalist technology, industry, and institutions that foreign investors could bring. As he put it in a 1931 speech, "we consider foreign capital necessary to countries of elemental economic development such as ours" (Alexander 1973, 189).

Between these two extreme positions, he advocated the regulation of foreign investment in order to ensure that it supported national goals instead of imperialism. As he put it, "there is good and necessary capital and unnecessary and dangerous capital. It is the state and only it—the anti-imperialist state—which must control the investment of capital under strict conditions" (Alexander 1973, 181). He also invoked Marxist theories of imperialism to counter arguments that regulations would scare away foreign capital:

> those who argue that to control foreign capital is to drive it away, are ignorant of economic law: the economic law of the expansion of capital which pushes it to come to us with as much force as we are pushed to receive it. If we discover the possibility of a balance of those forces, we can then live in good relations with foreign capital, without falling into dependence upon it, defending the equilibrium of our own economy and making foreign capital a cooperator in national economic development. (Alexander 1973, 189)

As part of his efforts to restrict foreign investment, he also urged the nationalization of key sectors of the economy. The meaning of the word was

somewhat ambiguous. *Nationalization* could simply mean limiting foreign investment in specific sectors in order that private national firms dominated. But it could also mean the creation of new state-owned firms in these sectors. For the latter, he invoked Argentina's creation of a government oil firm in 1922 and Uruguay's government firms in sectors that had been dominated by British investment in the country such as insurance and electric power established in the early 1910s (Alexander 1973, 218–20). Haya was particularly impressed by the Uruguayan leader who led the latter reforms, José Batlle y Ordóñez, a man who Haya later described in 1956 as "one of the greatest, or perhaps *the* greatest creator of the modern democracy of Indoamerica, whose extraordinary accomplishments are little known, due to the ignorance which our countries have of one another" (Alexander 1973, 220). Like Haya, Batlle had distinguished between useful foreign investments and those that drained profits from the country and eroded Uruguay's economic independence, although he did not link his ideas to broader political economy debates about imperialism (Vanger 1963, 197, 245–46; 1980, 38–39).

Indoamerican Economic Nationalism

Finally, Haya suggested that the anti-imperialist state should also commit to regional unity as a way of confronting US imperialism. His writing on this topic was particularly original. Contemporary advocates of Global IR such as Acharya (2016, 7) have argued that "regionalism is an important form of agency of non-Western actors, which has been suppressed in the IR literature." Acharya (2014, 654) has also argued that "the true pioneers of regionalism were not European, but Latin American. Latin Americans promoted regionalism at least a 100 years before the creation of the European Economic Community." In her recent analysis of Latin American IR, Deciancio (2016) reinforces this argument, noting that the goal of fostering Latin American unity dated back to Simón Bolívar and then was developed with a more economic focus by structuralist and dependency thinkers in the postwar period.

We fully agree with these arguments, but also want to highlight how Haya's important interwar contributions in this area are usually unjustly neglected by scholars of Latin American regionalism.[5] Although independence leaders such as Bolívar called for regional political unity, Haya's APRA movement was the first to try to bring it about through the creation of political parties across the region that were dedicated to this goal (Kantor [1953] 1966, 124). Even more important for discussions of Global IPE, Haya also placed new emphasis on the economic dimensions of regional unity, developing his ideas on this topic before structuralist authors. His thinking about economic regionalism make him one of the pioneers of what would become, in Tussie and Riggirozzi's (2015, 1043) view, a key theme in Latin American IPE.

Haya was not in fact the first Latin American thinker to promote the idea of economic regionalism as an anti-imperialist policy. In the mid-nineteenth century, some Latin American critics of European and US economic influence in the region had called for closer Latin American trade integration (e.g., Gobat 2013, 1367–69). In the early twentieth century, followers of Friedrich List such as Alejandro Bunge had also raised the idea of a commercial union—modeled on the German Zollverein—among Southern cone countries to offset US economic influence (Boianovsky 2013, 670–71; Bunge 1940, 279–83). Haya took these kinds of ideas in a more ambitious direction as tools to fend off imperialist pressures in his era.

[5]One recent exception is Rivarola and Briceño-Ruiz (2013) who briefly mention Haya among a list of Latin American thinkers who backed regionalism.

In addition to calling for a common market that encouraged greater trade and regional specialization within the region (Kantor [1953] 1966, 45), he urged Latin American countries to unite in their control of foreign capital, anticipating later initiatives undertaken by bodies such as the Andean Pact. As he put it in 1929, what was needed was "the formation of a bloc of economic defense for Latin America, a union which by the unity of leadership could fix uniform conditions for the necessary invasion of North American capital in our countries" (Alexander 1973, 244). This kind of cooperation would boost the bargaining power of Latin American governments and prevent one country's controls from simply diverting investment flows to countries without controls (Alexander 1973, 180). This call for investment-oriented regional cooperation was highly novel, and we are not aware of any other regionalist proposals of this kind elsewhere in the world in the nineteenth or early twentieth centuries.

More generally, Haya also issued a highly innovative call for the cultivation "among the masses" of a kind of "Indoamerican economic nationalism" (Alexander 1973, 143, 141). This regional "consciousness" would "go beyond the limited and localist, false patriotism of the spokesmen of chauvinism, and will include the twenty countries which form our great nation" (Alexander 1973, 141). It would "bring to our peoples that conviction that the wealth which imperialism exploits is ours and that that same wealth must be converted into our best defense" and demonstrate that "the boycott and passive or active resistance will be used against imperialism" (Alexander 1973, 143–44).

Haya argued that this sense of regional "nationalism" would be based on the fact that "in our spirit and our culture that there flourishes a reserve of strength emanating from the remote ancestry of the old races in these ancient lands . . . The Indian is within us." (Alexander 1973, 352). To reinforce this point, APRA songs and cheers included Quechua battle cries, and APRA cells were named after Inkan emperors (Beals 1935). Haya's thinking on this point drew on a wider "indigenismo" movement in Latin American intellectual circles at the time that validated and promoted the indigenous voice and culture in Latin American societies (Pike 1986, 50–60).

Haya's economic nationalism was innovative, not just in its invocation of a regional identity that could be mobilized to support regionalism and challenge US economic power. It also departed quite dramatically from the better-known versions of economic nationalism associated with European thinkers such as List. In contrast to List, Haya's economic nationalism drew heavily on Marxist analysis and had the end goal of a socialist society. It also advocated a much larger economic role for the state than List had backed. The much greater focus on controlling foreign investment also differed from List's more trade-centered ideas.

The Composition of the Anti-Imperialist Movement

To bring the anti-imperialist state into being, Haya argued for a broad-based alliance that included not just workers and peasants but also middle class groups. The European-dominated Second International had not focused much on the politics of resisting imperialism in the regions experiencing the phenomenon. But the issue attracted much more attention in the Third International, as Lenin saw anticolonial revolutions as a key tool for undermining Western capitalism. Haya's support for a "united front"—as opposed to a more narrow class-based anti-imperialist movement—was not unusual in anti-imperialist circles for much of the 1920s. As noted in the next section, the Comintern itself backed this kind of broad-based anti-imperialist movements before 1928. Not surprisingly, however, Haya did not mention the Comintern's position when defending this strategy. Instead, he drew explicit inspiration from Sun Yat-sen and his Kuomintang party,

arguing that he wanted APRA "to be what the Kuomintang is in China" (quoted in Chavarría 1979, 102; see also Alexander 1973, 119). Like Haya, Sun supported a united front policy in his goal of fighting imperialism in China. Sun was similar to Haya in combining his anti-imperialism with a recognition that China needed foreign capital—in a regulated manner—to help modernize and strengthen its economy (Helleiner 2014, chap. 7).

Haya also developed some important justifications for middle class groups to assume prominent roles in anti-imperialist movements that reflected his analysis of the Latin American context. For example, he was very critical of those who looked to the proletariat to lead anti-imperialist struggles, noting that this class in Latin America was a "complete minority, since it is only a nascent class" (Alexander 1973, 108–9). While the peasants were a much larger group, he felt that they would need allies beyond the small proletariat to be a successful movement. He pointed to the example of the Mexican revolution, a revolution involving workers, peasants, and the middle class (Pike 1986, 41, 50; Alexander 1973, 127–29, 164). More generally, he argued that the middle class included many intellectuals and those with various skills that could prove very useful to the anti-imperialist cause (Alexander 1973, 176–77).

His support for a kind of broad-based multiclass united front against imperialism also reflected his belief that that imperialism posed the more serious immediate danger to Latin America than internal class divisions. As he put it,

> our present historical task is the struggle against imperialism. It is the task of our time, of our epoch, of our state of evolution. It imposes upon us the temporary subordination of all other struggles which result from the contradiction of our social reality—and which are not collaborating with imperialism—to the needs of the common struggle. It is worth saying that we accept in a Marxist way the division of society into classes and the class struggle as expression of the process of history, but we consider that the greatest oppressing class—that which really backs all the refined system of modern exploitation ruling our peoples—is that which imperialism represents." (Alexander 1973, 150–51)

One final justification for giving the middle class a prominent role in anti-imperialist movements rested on an analysis of the winners and losers from imperialism within Latin American societies. He argued that middle class groups were more likely than workers and peasants to lead anti-imperialist movements because their economic position was initially more adversely affected. Although imperialism exploited workers and peasants, Haya argued that many of them initially received "a more secure and higher wage" as employees of new large foreign-owned manufacturing, mining, or agricultural firms than they had previously received: "They exchange their miserable wage of centavos or in kind for a higher one paid by their foreign master, who is always more powerful and richer than the national master" (Alexander 1973, 114–15). By contrast, he argued that much of the middle class found its economic position initially severely undermined by imperialism:

> the monopoly which imperialism imposes cannot avoid the destruction, the stagnation, and the regression of what we call generically the middle class . . . The small capitalist, the small industrialist, the small rural and urban proprietor, the small miner, the small merchant, the intellectual, the white collar workers, among others, form the middle class whose interests are attacked by imperialism. A very small segment of this middle class allies itself with imperialism and obtains advantages through becoming a cooperative aide and national front. Under the laws of competition and of monopoly controlling the existence of capitalism, the imperialist form—its culminating expression—destroys the incipient capitalist and proprietors, subjugates them, defeats them, and strangles them with the tentacles of the great trusts, when not under the yoke of banking credits and mortgages. The middle

> classes of our countries, as imperialism advances, see increasingly restricted the limits of their possible economic progress . . . This is the economic explanation of why the first cries against imperialism in our countries have come from the middle classes. (Alexander 1973, 116–7)

The IPE Ideas of Mariátegui

Haya's backing of a broad-based anti-imperialist movement led by middle class groups was the issue that provoked his split with Mariátegui. Born one year before Haya in the southern Peruvian town of Moquegua, Mariátegui had been raised in much poorer circumstances than his compatriot. His formal education ended at the eighth grade, after which he began working at a newspaper (Becker 1993). Like Haya, Mariátegui was attracted in his youth to the radical politics of the Peruvian student and labor movements. Also similar to Haya, his growing prominence in Peruvian radical politics prompted his departure from the country. In Mariátegui's case, the Peruvian dictator Leguía encouraged him to leave Peru in 1919 by offering him a post as an information agent in Italy, where he stayed until 1923.

It was in Italy where Mariátegui became much more exposed to Marxist thinking, particularly that circulating in Italian communist circles, including the ideas of Georges Sorel. When he returned to Peru, Mariátegui met Haya for the first time and gave seventeen lectures in 1923 at Haya's Prada Popular University. Although Mariátegui had been influenced by Prada's anarchist views in his youth, his lectures in 1923 focused on his new Marxist worldview. Because this worldview was so different than the anarchist ideas dominating the Popular University at the time, his lectures attracted much attention and helped to establish him as major intellectual figure in the Peruvian left (Vanden 1986, 34). His intellectual reputation was only reinforced by his extensive publications after this point, including two books, the best known of which was *Siete Ensayos de Interpretación de la Realidad Peruana* published in 1928.[6] In that same year, he founded the Socialist Party of Peru after breaking very bitterly with Haya. Mariátegui published many other writings as well, including in a journal titled *Amauta* that he created in 1926 and edited, which became very influential across Latin America.[7] He accomplished all this while being confined to a wheelchair following a leg amputation in 1924. He died in 1930 at the age of thirty-five.

Imperialism as the Highest Stage of Capitalism

Although Mariátegui's writings covered many topics (including much about art and culture), we are concerned here with his contributions to IPE thought. Like Haya, Mariátegui was very familiar with European Marxist theories of imperialism. They were prominently discussed in his important 1923 lectures, and he later published articles in *Amauta* by key thinkers such as Rosa Luxembourg and Vladimir Lenin (including excerpts of his 1916 work *Imperialism*) (Vanden and Becker 2011a, 256). Unlike Haya, however, Mariátegui fully embraced Lenin's idea that imperialism was the highest stage of capitalism.

He devoted considerable attention to this issue in his 1923 lectures, explaining to his audience why imperialism could not postpone the collapse of capitalism

[6]For readers with Spanish language skills, a well-known edition of *Siete Ensayos* is Mariátegui ([1928] 1955). For a more recent edition, see Mariátegui ([1928] 2007). For those wanting to read Mariátegui's book in English, see Mariátegui ([1928] 1971). Other important English language translations of this and other writings of Mariátegui's writings include Pearlman (1996) and Vanden and Becker (2011a). For reasons noted in footnote 3, we have cited from English translations of Mariátegui's work.

[7]For broader debates among Latin American Marxist intellectuals about Mariátegui's theoretical legacy, see Aricó (1982).

indefinitely. One reason was the growth of anti-imperialist movements in colonized regions, a development that he attributed in part to the fact that "the peoples of the East have seen the peoples of Europe fight, claw, and devour each other with such cruelty, such fury, and such perfidy that they no longer believe in their superiority and progress" (Pearlman 1996, 36). Mariátegui also pointed to the growing political opposition among workers in the West to colonialism: "the moral consciousness of the Western countries has advanced too far for policies of conquest and oppression to be defended and accepted by the popular masses" (Pearlman 1996, 36). When making this point, he provided a trenchant critique of the Western-centric nature of pre-1914 socialist politics in Europe: "English, French, and German workers were more or less indifferent to the fate of Asian and African workers. Socialism was an international theory, but its internationalism ended at the borders of the West, at the boundaries of Western civilization. The socialist and syndicalist spoke of liberating humanity, but in practice they were only interested in Western humanity" (Pearlman 1996, 36–37). Mariátegui welcomed the fact that the Third International took a wider, more global perspective that recognized the important role of anti-imperialist political movements outside Europe. As he put it, "Socialists are beginning to understand that the social revolution must not be a European revolution, but a world revolution" (Pearlman 1996, 37, 41).

Mariátegui told his Lima listeners that Peruvian politics needed to be viewed in the context of this broader global picture:

> The destines of all the world's workers are at stake in the European crisis. The development of the crisis, therefore, ought to interest the workers of Peru as it does the workers of the Far East. The main theatre of the crisis is Europe, but the crisis of European institutions is the crisis of the institutions of Western civilization. And Peru, like the other peoples of America, revolves in the orbit of this civilization, not only because its countries are politically independent but economically colonized, yoked to the wagon of British, America, or French capitalism, but because our culture is European and our institutions are of a European type. And it is precisely these democratic institutions that we have copied from Europe, and this culture that we have copied from Europe, that are now in a period of definitive and total crisis there. All above, capitalist civilization has internationalized the life of humanity and created material links among all peoples which establish an inevitable solidarity among them. Internationalism is not merely an ideal; it is a historical reality. Progress unifies and combines the interests, ideas, customs, and regimes of peoples. Peru, like other American peoples, is therefore not outside the crisis; it is part of it." (Pearlman 1996, 3–4)

He highlighted this theme about the role of Peru and Latin America in a wider global struggle many times in subsequent years. As he put it in 1928, "The Latin American revolution will be nothing more or nothing less than a stage, a phase of the world revolution" (Pearlman 1996, 88–89). In the next year, he reiterated the point in a famous passage: "we are anti-imperialists because we are Marxist, because we are revolutionaries, because we opposed capitalism with socialism, an antagonistic system called upon to transcend it, and *because in our struggle against foreign imperialism we are fulfilling our duty of solidarity with the revolutionary masses of Europe*" (Pearlman 1996, 135; italics added). His cosmopolitan perspective was also evident in *Amauta*, which featured many articles about anticolonial movements around the world (Chavarría 1979, 94).

Imperialism's Negative Impact in Latin America

Mariátegui argued that Peruvian Marxists needed to fight imperialism not just to support a global revolutionary movement but also to end its negative impact on their own region. Some of these impacts were ones Haya had also discussed. For

example, Mariátegui highlighted the exploitative dimensions of imperialism, describing how US and English interests involved in Peruvian agricultural sector would "exploit to the extreme" indigenous groups and "with the assistance of the national bourgeoisies" (Pearlman 1996, 96). In a 1926 article titled "Colonial Economy," Mariátegui also pointed to exportation of profits by foreign companies in Peru: "The profits from mining, commerce, transportation, and such do not stay in Peru. They mostly go outside the country in the form of dividends, interest, etc." (Vanden and Becker 2011a, 133–34).

In that same article, Mariátegui also devoted more attention than Haya had to a broader problem with Peru's "colonial economy": its vulnerability to fluctuations in the world prices of major exports such as sugar and cotton. He invoked the same term that Haya had used—dependency—to describe the situation: "A series of things that many people have become used to seeing as definitively acquired by Peruvian progress have ended up being dependent on the price of sugar and cotton in the markets in New York and London. Peru's economic dependency is felt throughout the nation" (Vanden and Becker 2011a, 133–34). Anticipating structuralist and *dependentista* critiques of the peripheral status of Latin American economies, Mariátegui noted more generally in his *Siete Ensayos* how the Peruvian economy "can only move or develop in response to the interests and needs of markets in London and New York" (Mariátegui [1928] 1971, 70). Mariátegui also went into more detail than Haya in highlighting the enclave nature of some foreign economic operations in the commodity sector:

> The profits from copper and petroleum enrich foreign companies, but they do not leave anything in the country except the fiscal taxes. In Talara, the International Petroleum Company, owner of its own port and ships, imports from the United States necessary consumer goods for the population that works in the petroleum region, including foodstuff. All the economic life of the region is found in the hands of the company, and it consequently does not drive the development of the neighboring agricultural regions. (Vanden and Becker 2011a, 249)

Earlier in 1924, Mariátegui also noted how Latin American countries' heavy reliance on commodity exporting essentially served foreign interests: "All of them are, more or less, producers of raw materials and foodstuffs that they sent to Europe and the United States, from which they receive machinery, manufactured goods, etc. . . . They function economically as colonies of European and North American industry and finance" (Pearlman 1996, 114). In addition, he suggested that foreign interests worked hard to maintain Latin America's subordinate position in this international division of labor. As his founding "programmatic principles" of the Socialist Party in 1928 put it, "Imperialism does not allow any of these semicolonial peoples [such as Latin America], whom it exploits as markets for its capital and commodities and as a store of raw materials, an economic program of nationalization and industrialization. It forces them into specialization and monoculture (oil, copper, sugar, and cotton in Peru)" (Pearlman 1996, 91). In *Siete Ensayos,* Mariátegui argued that even improvements to the agricultural sector could be inhibited by foreign interests' control of the sector: "The subjugation of coastal agriculture to the interests of British and American capital not only keeps it from organizing and developing according to the specific needs of the national economy—that is, first of all to feed the population—but also from trying out and adopting new crops" (Mariátegui [1928] 1971, 72).

In 1928, Mariátegui summed up the point about foreign constraints on Peruvian development: "The Latin American countries came late to capitalist competition. The inside lanes had already been assigned. The destiny of these countries in the capitalist order is that of being simply colonies" (Pearlman 1996, 88–89). Indeed, he went further to argue in 1929 that the growth of capitalism in Latin America only encouraged further foreign investment in ways that simply

reinforced the colonial character of their economies: "the economic condition of these republics is undoubtedly semicolonial, and this characteristic of their economies tends to be accentuated as capitalism, and therefore imperialist penetration, develops" (Pearlman 1996, 130). Anticipating dependency theory, this line of argument suggested that the only kind of Latin American development that was possible within global capitalism was a distorted and subordinate kind.

At the same time, however, Mariátegui devoted much less attention than Haya had to outlining specific international economic policies that anti-imperialists should support. The 1928 founding programmatic principles of his Socialist Party included twenty-one "immediate demands," but most did not relate to foreign economic policy.[8] Because of Mariátegui's criticisms of Peru's externally oriented economy, one would anticipate that he backed delinking or at least a more inward-oriented and protected economy. In 1924, however, he wrote positively about nineteenth century free trade on similar cosmopolitan grounds as Marx once had: "Free trade as an idea and as practice was a step toward internationalism in which the proletariat will recognize one of its desired ends, one of its ideals. Economic borders are weakened. This event strengthened the hope of a day to come when political borders no longer exist" (Vanden and Becker 2011a, 261–62).[9] Given his criticisms of Peru's role as a commodity exporter, he might also have been expected to have promoted action to build a more diversified and industrialized economy. In fact, however, he seemed to see Peruvian industrialization only as a far off possibility: "Because of its disadvantageous position in terms of geography, human resources, and technology, Peru cannot dream of becoming a manufacturing country in the near future. For many years it will have to continue its role in the world economy as exporter of primary products, foodstuffs, et cetera" (Mariátegui 1971[1928], 179).

Some of Mariátegui's other policy ideas seemed similar to those of Haya. For example, in his 1926 article "Colonial Economy," he argued that the problems created by foreign capital could be addressed by "Peruvianizing, nationalizing, emancipating our economy" (Vanden and Becker 2011a, 133–34). When criticizing the role of British and American capital in coastal agriculture, he also made clear his support for "a social policy of nationalizing our great natural resources" (Mariátegui [1928] 1971, 72). He also seemed to envision that a future socialist state might need to continue to support the development of modern capitalism domestically. In 1927, Mariátegui wrote: "the task of socialism, when it comes to power in the country, depending on the hour and the historical compass to which it must adjust, will to a great degree be the realization of capitalism, or better, the realization of the historical possibilities that capitalism still contains, in the sense that this serves the interests of social progress" (Pearlman 1996, 83–84, 91–92).

The Politics of Anti-Imperialism

Where Mariátegui differed sharply with Haya was on the question of the nature and composition of the anti-imperialist movement. One difference concerned the role of nationalism to the anti-imperialist struggle in countries subject to imperialism. While Haya's favored a regional "Indoamerican economic nationalism,"

[8]The closest was "forcing the mining and oil companies to permanently and fully recognize all the rights of their workers that are guaranteed by the country's laws" (Pearlman 1996, 93).

[9]Here is Marx's statement: "the Protective System, in *these days*, is conservative, while the free-trade system works destructively. It breaks up old nationalities and carries antagonisms of proletariat and bourgeoisie to the uttermost point. In a word, the free-trade system hastens the Social Revolution" (quoted in Hoselitz 1949, 232). In the Latin American context of the early twentieth century, Mariátegui's argument bore some similarities to that of Argentine socialist Juan Justo who argued that to work "against the vested interests of particular companies or groups, we must bring peoples together on the basis of free trade" (quoted in Miller 2008, 90).

Mariátegui was more focused on the nationalism of individual countries. In 1927, he explained its distinctive role in Latin America vis-à-vis that in Europe:

> The nationalism of European nations—here nationalism and conservatism are identified and consubstantiate—proposes imperialist ends. It is reactionary and anti-socialist. But the nationalism of the colonial peoples—yes, economically colonial, although they boast of their political autonomy—has a totally different origin and impulse. In these peoples, nationalism is revolutionary, and therefore ends in socialism. (Vanden and Becker 2011a, 175)

The much more significant disagreement between Haya and Mariátegui, however, concerned whether or not middle class groups should have a prominent role in anti-imperialist movements. The issue had also been a very controversial one within the Third International throughout the 1920s. In 1920, Lenin had backed broad-based anti-imperialist movements, despite disagreement from prominent Marxists from colonialized regions such as India's Manabendra Nath Roy who argued that bourgeois interests could not be trusted to consistently oppose imperialist interests. Stalin had subsequently pressured communist parties to join "united front" movements, generating great controversy, particularly after this proved devastating to the communists in places such as China, where Chiang Kai-shek—Sun Yat-sen's successor as leader of the Kuomintang (with which the communists had been encouraged to ally by Moscow)—turned on them brutally in 1927. After this, Comintern shifted to a more rigid position of backing only anti-imperialist movements led by the communist parties.

The split between Haya and Mariátegui was provoked by Haya's move to turn APRA into a formal political party of the "united front" type in the spring of 1928. Earlier, Mariátegui had backed APRA as a loose movement or alliance (Cozart 2014), but he now strongly opposed Haya's effort to transform it into this kind of a formal political party. After an exchange of angry letters, Mariátegui broke contact with him and established his rival Socialist Party. Although the split may partly have reflected Mariátegui's concerns about Haya's personal ambitions (Pike 1986, 70; Chavarría 1979), ideology was also central to the disagreement, with Mariátegui subsequently dismissing APRA as a "petit bourgeois and demagogic Nationalist party" (Pearlman 1996, 88).

The Haya-Mariátegui debate on this issue provided a distinctly Latin American contribution to wider, very heated controversies within international Marxist circles. In defending (Haya) and opposing (Mariátegui) "united front" policies, both thinkers developed important arguments that drew on creative analyses of the Latin American context. We have already discussed Haya's arguments about limitations of the revolutionary role of the proletariat and peasants in Latin America, the urgency of fighting imperialism in the region, and the potential of Latin American middle class groups to contribute to anti-imperialist movements. Mariátegui's analysis of the Latin American political economy was very different.

Like Roy, Mariátegui worried that bourgeois and petty bourgeois groups could not be trusted to lead anti-imperialist parties because they were too closely allied with imperialist forces. When defending this position, Mariátegui cited a number of examples. One was Peru itself, which was ruled by a "bourgeois regime in the thrall of imperialist interests" (Pearlman 1996, 91). Writing in 1929, he also invoked the "bourgeois-democratic revolution" in Mexico, noting that the petty bourgeoisie in power in the country after the revolution had "just allied with Yankee imperialism." Looking outside the region, he also cited the Kuomintang's repression of local Communists, noting that "their capitalist style of nationalism (one not related to social justice or theory) demonstrates how little we can trust the revolutionary nationalist sentiments of the bourgeoisie, even in countries like China" (Pearlman 1996, 129–30, 132)

In the context of Latin America, Mariátegui also introduced the significance of race and culture to the debate. He distrusted the Latin American bourgeoisie not just because they saw "cooperation with imperialism as their best source of profits." They were also unlikely to support anti-imperialism because, as he put it in 1928, "the native aristocracy and bourgeoisie feel no solidarity with the people in possessing a common history and culture. In Peru, the white aristocrats and bourgeois scorn the popular and the national. They consider themselves white above all else. The petty bourgeois mestizo imitates their example." (Pearlman 1996, 130–1).[10] He reinforced this argument in 1929, noting that race "keeps the question of the struggle for national independence in those American countries with a large percentage of indigenous peoples from paralleling the same problem in Asia or Africa." He continued:

> The feudal or bourgeois elements in our countries feel the same contempt for Indians, as well as for Blacks and mulattos, as do the white imperialists. This racist sentiment among the dominant class acts in a way absolutely favorable to imperialist penetration. There is nothing in common between the native señor or capitalist and his peons of color. The solidarity of racisms and prejudice joins class solidarity in making the national bourgeoisies the docile instruments of Yankee or British imperialism. And this sensibility extends to the larger part of the middle classes, who imitate the aristocracy and the bourgeoisie in their disdain for the plebian of color, even when it is quite obvious that they themselves are of mixed nationality (Pearlman 1996, 97).

Mariátegui also challenged Haya's argument that imperialism undermined the economic position of the middle class in ways that would encourage that class to lead the anti-imperialist struggle:

> [I]n countries afflicted with Spanish-style poverty, where the petty bourgeoisie, locked in decades-old prejudice, resists proletarianization; where, because of their miserable wages, they do not have the economic power to partially transform themselves into a working class; where the desperate search for office employment, a petty government job, and the hunt for a "decent" salary and a "decent" job dominate, the creation of large enterprises that represent better-paid jobs, even if they enormously exploit their local employees, is favorably received by the middle classes. A Yankee business represents a better salary, possibilities for advancement, and liberation from dependence on the state, which can only offer a future to speculators. This reality weighs decisively on the consciousness of the petty bourgeois looking for or in possession of a position." (Pearlman 1996, 135)

For all these reasons, Mariátegui argued that imperialism could not be stopped with a nationalist movement that was led by the bourgeoisie and/or petit bourgeoisie. As he put in the programmatic principles of his Socialist Party, "the emancipation of the country's economy is only possible through the action of the proletarian masses in solidarity with the international anti-imperialist struggle" (Pearlman 1996, 91). Less doctrinaire than Comintern's position, however, he welcomed intellectuals and middle class figures into his Socialist Party if they accepted the party's program (Basadre 1971; Chavarría 1979, 175). His choice of the name "Socialist Party"—instead of Communist Party—also signaled independence from Comintern, which censured him for this choice and declared his ideas "no more advanced than the ideas of old-fashioned *petit bourgeois* socialism"

[10]He allowed for some exceptions: "Only in countries such as Argentina, where there is a large and rich bourgeoisie proud of their country's wealth and power and where the national character for this reason has clearer contours than in more backward countries, could anti-imperialism (perhaps) penetrate more easily among bourgeois elements" (Pearlman 1996, 131). In 1929, he also mentioned central America as a possible exception: "There, Yankee imperialism, by resorting to armed intervention without the slightest hesitation, does provoke a patriotic reaction that could easily win a part of the bourgeoisie and petty bourgeoisie to an anti-imperialist perspective" (Pearlman 1996,133).

(quoted in Ameringer 2009, 95).[11] But he was very clear that any anti-imperialist movement had to have revolutionary socialist goals at its core. As he put it in 1929, "our mission is to explain to and show the masses that only the socialist revolution can stand as a definitive and real barrier to the advance of imperialism." (Pearlman 1996, 133).

Indigenous Peoples and Values in the Revolutionary Struggle

One other way that Mariátegui departed from Comintern orthodoxy was his view that the revolutionary struggle should include not just workers but also oppressed indigenous peoples. His emphasis on this point was also distinctive from the ideas of Haya who devoted much less attention to the role of indigenous peoples in the anti-imperialist struggle. In the Peruvian context, Mariátegui noted that the masses "are four-fifths Indian" so "our socialism would not be Peruvian—nor would it be socialism—if it did not establish its solidarity principally with the Indian" (quoted in John 2009, 37). Mariátegui was also very aware of widespread indigenous uprisings in the Peruvian rural highlands at the time. As Jacobsen (1993, 337) notes, "the decade between 1915 and 1925 witnessed the most widespread peasant movements in the altiplano since the early 1780s." These uprisings were reacting against rising taxes, labor services, and especially forced land grabs by large estate owners, and they attracted extensive attention among intellectuals and politicians in Lima, many of whom took up the rebels' cause (Jacobsen 1993, 338–39, 345). Although he only traveled once to the Peruvian highlands, Mariátegui had lively discussions with indigenous leaders and showed a keen interest in their struggles around land (Miller 2008, 147; Grijalva 2010, 319–20).

Mariátegui saw Peru's indigenous peoples not just as a revolutionary force but also as source of socialist values. While Haya invoked the culture of indigenous peoples to support a regional Indoamerican economic nationalism, Mariátegui drew on them in support of his socialist cause. From the Inkan world, he argued "we have inherited instinctively the idea of socialism" (quoted in Subirats 2010, 518).[12] Mariátegui argued the Inkan economy had resembled a kind of "agrarian communism" whose "collectivist organization" had installed in the indigenous peoples "the habit of a humble and religious obedience to social duty, which benefited the economic system" (Mariátegui [1928] 1971, 35, 3). He argued that a Peruvian socialist revolution could both draw upon, and help to restore, these values: "the revolution defends our most ancient traditions"' (quoted in Subirats 2010, 518).

Mariátegui was not alone in linking indigenous values to socialism. Some Latin American liberals had earlier made the same connection, but in a very negative way to explain the failure of indigenous peoples to become modern liberal economic actors. As one liberal Mexican writer (Maqueo Castellanos) complained in 1909, indigenous peoples practiced "imperfect and absurd socialism" (quoted in Weiner 2004, 36). Mariátegui turned the tables on these arguments, casting the socialism of indigenous peoples in Peru in a positive light as a foundation for anti-imperialist politics.

In so doing, Mariátegui made clear that his invocation of Inkan values "in no way signifies a romantic and antihistorical tendency toward the reconstruction or resurrection of Incan socialism, which correspond to historical conditions, which have been completely superseded, and of which only those habits of cooperation and socialism among the indigenous peasants remain as a factor that can be used in the context of a fully scientific productive technique" (Pearlman 1996, 92). Indeed, he trumpeted indigenous peoples' "abilities to assimilate progressive

[11]Mariátegui's party was renamed Peruvian Communist Party after his death, and it became very orthodox.
[12]Following Mariátegui, we spell Inka with *k* rather than *c* (Grijalva 2010, 330fn1).

techniques of modern production," abilities that he thought were "generally superior" to those of mestizos (Pearlman 1996, 98). He was also critical of thinkers such as Gandhi, who sought to restore the simplicity of preindustrial village life, arguing "once the machine has been acquired, it is difficult for humanity to renounce its use" (Pearlman 1996, 48–49). Unlike Gandhi, he celebrated modernity, writing in 1917 that "I find it good, great, and magnificent. I am happy that I was born into it . . . I take pleasure in going for a drive in a car. Electronic light gladdens me. I like aeroplanes. I'm interested in cinema" (quoted in Miller 2008, 145).

Mariátegui's emphasis on indigenous values was related to his broader interest in the importance of revolutionary "myths," an interest he picked up from Italian communist debates and the ideas of Georges Sorel. His appeal to Inkan socialism enabled Mariátegui to link the struggles of Peruvian indigenous peoples to the socialist ideals driving the world anti-imperialist movement. As he put it in 1927, "this very myth [socialism], this very idea, is the decisive agent in the awakening of other failing ancient peoples and races: Hindus, Chinese etc. . . . Why should the Incan people, who constructed the most developed and harmonious communist system, be the only group insensitive to the world's emotions. The close relationship between the indigenous movement and the world's revolutionary movements is too obvious to document" (Pearlman 1996, 81).

Mariátegui's appeal to Inkan socialism also served as a useful nationalist myth in the anti-imperialist struggle. Elite-based conservative Peruvian nationalism had long focused on European values with little reference to the indigenous peoples of Peru. To build a new nation on socialist foundations, Mariátegui challenged that elite conception, arguing in 1924 that "the Indian is the foundation of our nationality in formation" (Vanden and Becker 2011a, 141). This idea built directly on the thinking of Prada who had blamed Peruvian elites for the country's humiliating defeat to Chile in the early 1880s and seen Peru's indigenous peoples a key to the regeneration of the country (Chang-Rodríguez 1984; Coronado 2009, 8; Ameringer 2009, 96). In cultivating this new conception of Peruvian nationalism, Mariátegui also rejected Comintern's suggestion that separate states be created for indigenous peoples such as the Quechua. In 1929, he wrote that such states would not lead "to the dictatorship of the Indian proletariat, much less to the formation of an Indian state without classes as some have argued, but rather to the establishment of an bourgeois Indian state with all of the internal and external contradictions of any bourgeois state" (quoted in Becker 1993, 47).

Eurocentrism

These ideas also allowed Mariátegui to promote a revolutionary myth that decentered Peruvian Marxism from its European origins. As he put it in 1928, "Socialism is ultimately in the American tradition. Incan civilization was the most advanced primitive communist organization that history has known. We certainly do not wish socialism in America to be a copy and imitation. It must be a heroic creation. We must give life to an Indo-American socialism reflecting our own reality and in our own language" (Pearlman 1996, 89). This line of argument was part of a broader case he made that "Europe has lost the right and capacity to influence spiritually and intellectually our Young America" (quoted in Becker 1993, 82).

Mariátegui's argument was also important in directly challenging the civilizational narratives of classical European political economy, including those of Marx. Those narratives saw Europe as the standard of civilization for other regions of the world and they had been very influential, not just in Europe, but also among Latin American elites who felt themselves surrounding by local "barbarism" that they associated with the traditional, rural, and indigenous

elements of their societies (e.g., Schulz 2014; Montecinos and Markoff 2001, 111). Peruvian rural elites had been among those who had increasingly invoked European civilizational values in the late nineteenth century to justify their local power and privileges vis-à-vis the local indigenous peasantry. Jacobsen (1993, 355) notes how these elite ideologies provoked a reaction among the peasantry who "came to have a stronger sense of its own separate and subaltern identity" and whose leaders increasingly invoked memories of the Inkan past (see also 342–43). Mariátegui built on those ideas to directly challenge what Subirats (2010, 519, 518) calls "the Eurocentric conception of a singular 'civilisation process'" by trumpeting and seeking to restore the values of the Incan civilization that had been undermined by European colonization.[13]

Mariátegui's focus on indigenous peoples and their values thus challenged European Marxist theories of imperialism in important ways. As Grigory Zinoviev, longtime Russian head of Comintern, put it, "he does not parrot what the Europeans say. What he creates is his own" (quoted in Chavarría 1979, 162). At the same time, it is important not to overstate his break with European ideas. At the start of *Siete Ensayos*, he made his debt to European ideas very clear: "I have served my best apprenticeship in Europe, and I believe the only salvation for Indo-America lies in European and Western science and thought" (Mariátegui [1928] 1971, xxxvi).

This stance was partly linked to his broader view about the centrality of Europe in the crisis of capitalism and birth of a new socialist order. As he put it in 1923, "the new civilization is being forged in Europe. America has a secondary role in this stage of human history" (Mariátegui [1928] 1971, xvi). As he noted in 1928, it also reflected his view of the cosmopolitan nature of socialism, despite its European origins:

> socialism, although born in Europe as was capitalism, is neither specifically nor particularly European. It is a worldwide movement from which none of the countries that move in the orbit of Western civilization can escape. This civilization moves toward universality with a force and with means that no other civilization has ever possessed. Indo-America, in this world order, can and must have its own individuality and style, but not its own culture or particular destiny (Pearlman 1996, 89)

Mariátegui's belief that his region's salvation lay in European thought may also have reflected his skepticism of the intellectual traditions of Latin America. The skepticism was particularly apparent in a 1925 article he wrote titled "Is There Such a Thing as Hispanic-American thought?" Here is his answer: "The existence in Western culture of French thought, of German thought, seems evident to me. The existence of Hispanic-American thought in the same sense does not seem equally evident . . . Hispanic-American thought is generally only a rhapsody composed from the motifs and elements of European thought" (Pearlman 1996, 118).

As we have seen, Haya had similar criticisms of the Eurocentric nature of so much Latin American thought, but he did not share at all Mariátegui's belief that "the only salvation for Indo-America lies in European and Western science and thought." Indeed, when the two men exchanged harsh letters in the spring of 1928, Haya made a point of accusing Mariátegui of being a "Europeanizer" (quoted in Vanden 1986, 124). In one letter in May 1928, he gave Mariátegui the following advice: "Be realistic and try to take your discipline not from revolutionary Europe but from revolutionary America. You are doing a great deal of damage because of your lack of calm and your eagerness always to appear European within the terminology of Europe" (quoted in Basadre 1971, xxiii). It was this letter that provoked Mariátegui to break off all contact with Haya.

[13]Some are critical of Mariátegui's invocation of indigenous values as "ambiguously trapped in an idealized view of indigenous people" (Grijalva 2010, 317).

Conclusion

Both Haya and Mariátegui made important contributions to IPE debates during the interwar period. To begin with, they each provided innovative analyses of the negative impacts of imperialism on Latin America, analyses that challenged the idea that Latin American capitalism would simply follow Europe's growth experience. These analyses highlighted not just the exploitative nature of imperialism in Latin America but also how it introduced a dependent kind of capitalism that was locked in commodity exporting role with compromised national sovereignty and a weak bourgeoisie allied with foreign interests.

Both thinkers also provided detailed justifications for (Haya) and against (Mariátegui) united front strategies for challenging imperialism, debates that offered important contributions to the raging debate on this issue within international Marxist circles at the time they were writing. Their justifications drew on important analyses of Latin American political economy, including issues such as the domestic distributional consequences of imperialism and (in the case of Mariátegui) the role of race and culture. Their analyses of anti-imperialist politics in Latin America raised other original points such as Haya's ideas about state capitalism, regulating foreign capital, and regional "Indoamerican economic nationalism," as well as Mariátegui's focus on the role of indigenous peoples and their values in the revolutionary struggle.

Haya also questioned the relevance to Latin America of Lenin's assertion that imperialism was the highest stage of capitalism and developed a stage theory of development that reflected his reading of the region's distinctive economic position. Underlying Haya's questioning of Lenin was an innovative historical time-space theory that challenged the universality of European thought, the Eurocentrism of Marxist theory, and the mental colonialism of Latin American intellectuals. Although Mariátegui took a more orthodox position in backing Lenin's thesis and the importance of European thought, his ideas about indigenous peoples and Incan values also challenged the Eurocentrism of socialist ideas and conventional civilizational narratives.

The originality of both thinkers stemmed from the fact that they brought a Latin American perspective to the debates generated by European Marxist theories of imperialism. Those theories of imperialism before 1918 had not devoted much attention to Latin America; for example, Lenin's *Imperialism* barely mentioned the region. Even within the Third International, Latin America was seen by Comintern leaders and intellectuals as a region quite peripheral to the world revolutionary movement (Caballero 1986, 1, 66, 69). As Meschkat (2008, 48) notes, it was not until the Sixth World Congress in July/August 1928 "that Latin America was explicitly placed on the agenda of an important Comintern meeting." Haya and Mariátegui played a pioneering role in offering a Latin American perspective on the phenomenon of imperialism. In doing so, they drew on history and experiences not just from their own country but also from other Latin American countries, including the Mexican revolution (from which they drew quite different lessons) as well as other Latin American thinkers who are quite neglected by IPE scholars today such as Batlle. Interestingly, they also looked to anti-imperialist movements and thinkers in other regions beyond Europe and North America for comparisons and lessons, such as Sun Yat-sen and his Kuomintang in China (where, once again, they drew opposite lessons) and Gandhi in India.

It is important, however, not to overstate the novelty of Haya's and Mariátegui's critiques of the negative economic and political impacts of foreign investment in the region and of the region's dependence on commodity exporting. A number of Latin American thinkers in the pre-1914 period expressed concerns about the power of foreign investors, processes of wealth extraction by foreign interests,

monopoly power and price manipulation in the global economy, and various costs of commodity specialization. These concerns were also often accompanied by strong language that described Latin American countries as "tributary" countries (Woźniak 2014, 193–94) or economic "satellites" (Monteón 1982, 62) of foreign powers as well as being economically "colonized" (Frank 1967, 87) or being subject to the "tyranny of foreign markets" (Gootenberg 1993, 120). To address these situations, many of these critics called for their state to take a larger role in the economy, including through measures such as trade protectionism and nationalization, and they often attacked the hegemony of European liberal ideas in Latin America, while calling for a less "imitative" thinking that would recognize the distinctiveness of Latin American circumstances (Gootenberg 1993, 122–23).

Haya and Mariátegui echoed many of these ideas, but placed them in a novel context of Marxist debates about imperialism (a word that was less widely used in Latin America to describe the role of foreign economic interests before the 1920s). It is unclear how much Haya and Mariátegui were directly influenced by these earlier critiques, but it is noteworthy that Peru was an important source of many of these criticisms in the nineteenth century. For example, Gootenberg (1993) has shown how Peru's guano boom and bust from the 1850s to the 1870s encouraged prominent critical Peruvian analyzes of the country's dependence on commodity exports and foreign investment (as well as criticisms of "imitative" ideas from Europe). He also highlights Luis Esteves' pioneering economic history of Peru published in 1882 that lamented how Europeans had "relegated to us the subaltern post of pliers of raw material" and called for industrialization with a focus on promoting rural textile production by indigenous peoples in ways that drew upon past Inkan achievements with new machines and training (Gootenberg 1993, 190). A prominent Peruvian business leader had also complained in 1907 of Peru's status as a "satellite" of Europe and the United States (Bollinger 1977, 35). The fact that these criticisms were "in the air" intellectually in Peru may help to explain why the two most prominent Latin American thinkers to engage with Marxist theories of imperialism in the interwar period came from that country, despite the fact that, as Miller puts it, "Peru had no socialist tradition (unlike Argentina, Uruguay, or Chile)" (Miller 2008, 153).

If the analyses of Haya and Mariátegui built upon pre-1914 local criticisms of liberal thought, their analyses also served as an important precursor for the ideas of Latin American structuralist and dependency thinkers after 1945. As we have seen, Haya and Mariátegui addressed many issues that became prominent in the postwar literature such as the following: economic imperialism as an exploiting and conquering force, the distorted and dependent nature of capitalism in the region, the impossibility of following the development path of earlier capitalist powers, concerns about the region's commodity-exporting role, the role of state capitalism and controls on foreign investment, the prospects for regional economic solidarity, ties between the local bourgeoisie and foreign interests, and debates about the composition of anti-imperialist struggles.

Key aspects of the Haya-Mariátegui debate even prefigured the structuralism-dependency debates of the postwar period. Mariátegui's skepticism of the Latin American bourgeoisie's tendency to serve foreign interests anticipated dependency theory analyses of the "comprador" nature of that class as did his broader case that the destiny of Latin American countries within global capitalism was to be economically colonized. For both dependency theorists and Mariátegui, only a socialist revolution could effectively challenge the dependent status of the region. By contrast, Haya was convinced that Latin American countries could advance economically within the world capitalist order if their states managed the countries' economic relationship with that order effectively. This position was much closer to the postwar structuralist position (albeit with more radical, anti-imperialist rhetoric) as was his willingness to work with national business interests in pursuit of national

development goals. Some of Haya's specific recommendations about managing Latin America's relationship with the world economy also anticipated structuralist ideas, such as his advocacy of careful regulation of foreign investment, domestic development planning, and the cultivation of economic regionalism.

Given these precedents, it is surprising how the scholarship on the origins of structuralism and dependency theory devotes relatively little attention to the ideas of Haya and Mariátegui. If they are mentioned at all, Haya and Mariátegui are usually just discussed briefly in passing before the discussion moves on to show how structuralism and dependency theory drew upon—and integrated in innovative ways—intellectual sources from outside the region, such as Keynesianism, French economic structuralism, the German historical school, East European economic thought, US and European Marxist theory (e.g., Kay 1989; Palma 2009; Love 1980, 1990, 1996; Cardoso 1977; Lustig 1996; Packenham 1992).[14] We do not disagree that these external influences were important, but we think more attention should be focused on the potential significance of a long and rich intellectual tradition in Latin America itself that anticipated these theories.[15]

This is not the place to try to prove a causal link from the Haya-Mariátegui debate to structuralism and dependency theory in a detailed way. But their ideas were certainly known in the region after the war. For example, Hirschman (1971, 278) argues that basic ingredients of Haya's thought "left a deep mark on Latin American economic thinking." It is also worth noting that political parties linked with Haya's APRA movement in interwar years remained influential in many Latin American countries after the war and that his 1928/1935 book was reissued in 1970 (Pike 1986, 374fn21; Kay 1989, 15). Mariátegui also remained an iconic figure for many Latin Americans in the postwar years, particularly after the Cuban revolution when Miller (2008, 144) notes "his books became obligatory reading for the radicalized generation of the 1960s, a process aided by the publication of his complete works from 1959 onward."[16] Key dependency thinkers such as Dos Santos (Aboul-Ela 2007, 40), Cardoso and Faletto (1979, 121), and Frank (1967, 123) were also clearly familiar with Mariátegui's work, even if they did not cite it widely. Even if a strong causal link cannot be proven, it is clear that Haya and Mariátegui's ideas were "in the air" intellectually in the region.

For those reasons alone, Haya and Mariátegui deserve more attention than they have received in the teaching of the classical foundations of IPE. But they should also be better recognized in the field because many of their ideas remain very relevant today for IPE scholars interested in the Latin American region today. Mariátegui continues to be recognized in the contemporary era as a key figure in Latin American Marxism and his writings still spark various debates in the region (Beigel 2003, 15–18; Bergel 2016). Haya's innovative ideas about economic regionalism (including the relevance of regional identities) and the regulation of foreign investment also speak directly to issues at the core of Latin American IPE debates today in both Marxist and non-Marxist circles. Both thinkers were also interested in another key issue that is currently very politically salient in the region: the link between IPE and the values of indigenous peoples. In addition, the disagreements between Haya and Mariátegui also speak to longstanding but ongoing debates on the left in the region and elsewhere about issues such as imperialism's compatibility with capitalist industrialization (e.g., Warren 1973), multilinear versus unilinear evolutionary schemas of historical development (e.g., Melotti

[14]Among the authors cited, Mariátegui is mentioned by Love (1990, 161), Palma (2009, 244), and Packenham (1992, 10–12), while both Haya and Mariátegui are mentioned in Kay (1989, 15–17).

[15]For this point more generally, see Gootenberg (1993), Bollinger (1977), Woźniak (2014), Popescu (1997, 270), and Love (1996, 217, 232–33). Gootenberg (1989, 142–43) suggests briefly that dependency theory built upon the ideas of Haya and Mariátegui. Scholars of Mariátegui often note that his ideas anticipated dependency theory (e.g., Vanden and Becker 2011b, 41–42; Aboul-Ela 2007, 39; Beigel 2016, 4–5)

[16]The Cuban revolutionaries were also familiar with his ideas (e.g., Aboul-Ela 2007, 39; Becker 1993).

1977), and divisions between comprador and national bourgeoisie in underdeveloped regions (e.g., Poulantzas 1973).

Perhaps most importantly, however, is the relevance of their ideas to those now seeking to construct a more Global IPE. As we have shown, these two Latin American thinkers did not just passively import European classical IPE ideas. Rather, they generated some innovative ideas about IPE issues that reflected their distinctive economic, political, social, cultural, and intellectual contexts in Latin America. Indeed, contemporary Latin American decolonial thinkers such as Quijano (2014, 288) and Castro-Gómez (2005, 48) identify the contributions of Haya and Mariátegui as pioneering critiques of Eurocentric epistemologies. In this way, their critiques stand as early original efforts to contribute to the building of a more inclusive and diverse Global IPE of the kind that many scholars are aspiring to develop today in both Latin America and beyond.[17]

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[17]For the strong contemporary interest in developing region-specific theory in Latin America, see the evidence presented in Wemheuer-Vogelaar et al. (2016, 29–30).

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