

Challenging National Borders from Within: The Political-Class Formation of Indigenous Peasants in Latin America*

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Nous explorons la récente mobilisation des paysans autochtones en Amérique latine et soutenons qu'elle recherche une reconnaissance des différences culturelles et ainsi remet en question les définitions hégémoniques du statut de nation et de l'internationalisme néolibéral. Les luttes autochtones incluent l'autodétermination et l'usage collectif du territoire pour la reproduction de l'identité indigène, et ébranlent directement les élans néolibéraux vers la privatisation et l'individualisation. Nous mettons en doute à la fois les points de vue marxistes et les théories des nouveaux mouvements sociaux sur les politiques de l'identité. À la place, nous proposons une synthèse théorique où la classe et l'identité servent de parties constitutives à la formation d'une classe politique.

We explore the recent Indian-peasant mobilization in Latin America. We argue that this mobilization seeks recognition of cultural differences and thus challenges hegemonic definitions of nationhood and neoliberal globalism. Indian struggles include self-government and collective use of land for the reproduction of indigenous identity, and directly undermine the neoliberal drive towards privatization and individualization. We question both the Marxist views and the new-social-movement theories on *identity* politics. Instead, a theoretical synthesis is proposed where both class and identity serve as constituent parts of political-class formation.

THE PURPOSE OF THIS PAPER IS TO OFFER a conceptualization of the ideological and normative challenges to neoliberal globalism posited by Indian-peasant mobilization in Latin America at the start of the 21st century. Our empirical referents are Mexico's Zapatista National Liberation

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Army (Ejército Zapatista de Liberación Nacional, EZLN) and Ecuador's Confederation of Indigenous Nationalities of Ecuador (Confederación de Nacionalidades Indígenas de Ecuador, CONAIE). We argue that this mobilization challenges hegemonic definitions of nationhood and directly opposes neoliberal globalism on the ideological terrain: the liberal ideology behind neoliberal globalism focusses on the goal of equality of individuals, but indigenous struggles demand respect for and legal recognition of group cultural difference. Furthermore, Indian struggles also comprise demands for land and self-government, which include collective forms of property and are considered central to the cultural reproduction of indigenous identity. These demands go directly against the neoliberal drive toward privatization and individualization of social life. Yet, in the face of vigorous Indian-peasant movements from below, a postliberal conceptual and normative framework may provide the basis for expanding the nation from within, so as to accommodate Indian peoples.

Our more general argument is that the new Indian-peasant mobilization also results in a strengthening of civil society vis-à-vis the state, specifically based on the growth of organizations of subordinate groups and classes. This amounts to what Jonathan Fox aptly termed the "thickening of civil society" (1996). Therefore, even if some particular movement goals are not achieved, the resulting solidarity and organization will nonetheless reinforce future struggles and citizenship.

In explaining Indian-peasant mobilization, we challenge traditional Marxist views that continue to emphasize *class* as the main anchoring of social struggles, as well as postmodern and new-social-movement theories that primarily emphasize *identity* politics. Because indigenous struggles in Mexico and Ecuador (and in most other places in the Americas [Assies, van der Haar and Hoekema, 2000; Wearne, 1996; Otero, 2003; Sieder, 2002]) are inseparable from struggles for autonomy, self-governance and the control over natural resources, we cannot see them through the lens of identity politics alone. The economic conditions for Indian cultural reproduction must also be contemplated. Similarly, we cannot diminish in importance the ethnic-identity component of such mobilizations in favour of strictly class-based interpretations, because Indianness (as the participants of indigenous mobilizations conceive of and frame it) constitutes a central challenge to emerging liberal democracies in the region. We propose a theoretical synthesis in which both class and identity are core constituent parts in the political-class formation of Indian peasants.

In the first section, we critique traditional Marxism and new-social-movement theories. In the second, we offer the theory of political-class formation (PCF) proposed by Otero in *Farewell to the Peasantry? Political Class Formation in Rural Mexico* (1999) as an alternative framework for

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explaining Indian-peasant mobilizations. This theory combines state intervention, culture and leadership types to explain the links between class structural processes and political outcomes in a systematic manner. Our focus in the third section, however, is narrower. We trace the ways in which material grievances have been articulated to ethnic demands, given the regional cultures and the processes of collective identity formation that prevail in Mexico and Ecuador. Next, we discuss the conceptual and normative issues involved in redressing Indian rights and citizenship in emerging democracies. We thus juxtapose an establishment-friendly conceptual and normative perspective on Indian rights and citizenship with our bottom-up theory of political-class formation. By doing so, we hope to contribute to establishing better grounds for further dialogue between states and Indian-peasant movements in the negotiation of how to expand national borders within. The final section outlines the main theoretical, substantive and policy conclusions.

Neoliberal Globalism, Indigenous Movements and Contending Theories

Before plunging into our subject matter, let us provide a definition of neoliberal globalism. We will then discuss how traditional Marxism and new-social-movement theories approach the Latin American "Indian question" today.

"Neoliberal globalism" is the ideological approach taken primarily by the U.S. government and most economic supranational organizations, such as the International Monetary Fund and the World Bank, in promoting an all-out market approach as a development model. Neoliberal globalism is variously known as Structural Adjustment Programs, The Washington Consensus, Liberal Productivism, and the New World Order. Its general state policy prescription for all countries is to encourage massive flows of capital across borders (into production or stock market speculation), cut public expenditures, reduce or eliminate protectionist barriers to trade, reduce or eliminate subsidies to local industries, balance budgets, lower corporate taxes, deregulate businesses, and encourage foreign ownership and control. In short, it is the export/application of the American model of capitalism, but it has also gained such a considerable degree of acceptance among Latin America's ruling classes that they have made it their own (Otero, 1996; 2004; Teichman, 2001).

Traditional Marxism and the Primacy of (Economic) Class Grievances

James Petras and Henry Veltmeyer are two of the better-known sociologists operating within the rather uniform ideological space occupied by traditional Marxism. They have established themselves among the most

vigilant ideologues of traditional Marxism (TM or the "old left") within the pool of contemporary social-movement theorists. Over the past decade, they have published numerous books and articles asserting the continuing relevance of Marxist class analysis to the widely varied social dynamics of Latin America. Many of these publications have dismissed the concept of identity politics and the theories of new social movements from which it derives as spurious productions of postmodernism, completely inadequate to explain Latin American protest and mobilization. They reduce even gender and ethnic identity issues to class contradictions (Petras, Veltmeyer and Vieux, 1997: 55).

It is significant that this rejection of ethnic identity as a determinant of social resistance (voiced consistently throughout the writings of Petras and Veltmeyer) is framed in direct opposition to postmodern thought and the theories that embrace it. Postmodernism, by denying the existence of real social facts and focussing on the *meaning* of movements, rather than their causes (Petras and Veltmeyer, 2001: 89), challenges the continuing legitimacy of modernist theories and, in particular, of traditional Marxism. In response to this ideological threat, Petras and Veltmeyer have attempted to reaffirm the validity of TM by addressing empirical examples of several contemporary Latin American peasant movements and showing that the grievance motivating these movements can be found in relations of production (and not in identity).

In one of their most recent publications, Petras and Veltmeyer (2001) frame their argument for a "reconstituted class analysis" within a critique of structuralist and NSM theories. They argue that NSM theories are reductionist because they focus on the supposedly postmodern "cultural identities, attributes and demands" of peasant movements while ignoring the forms of political struggle employed by these movements (Petras and Veltmeyer, 2001: 85). In their estimation, the "defence of politico-cultural rights" (or "identity politics" in the language of NSM theorists) is a phenomenon subordinate to—and subsumed by—class struggle, and therefore does not pose a threat to a traditional Marxist interpretation of contemporary peasant movements.

Petras and Veltmeyer support their claim that ethnic identity is functionally subordinate to class identity by citing "internal class differences and the playing out of those differences in class conflicts within ethnic groups" (2001: 100). However, the reverse observation (that ethnic conflicts occur between members of the same social class) can certainly be made and does not necessarily imply that ethnic identity is an earlier or more fundamental identity than social class. Petras and Veltmeyer are correct in asserting the fundamental importance of class structures and relations to the consolidation of contemporary indigenous movements, but they are minimizing the role of ethnic identity in this same process. The dissolution of ethnic-based struggle into the broader phenomenon of intra-ethnic class

struggle drastically oversimplifies the complex relationship between class and ethnicity that is evident in several contemporary Latin American indigenous movements.

New-Social-Movements Theory and the Politics of Identity

Some of the theories that are most critical of traditional Marxist interpretations of social movements belong to the new-social-movements (NSM) perspective. This perspective developed largely as a reaction to TM's reductionist emphasis on (economic) class position as the almost sole motivation for political action (Pichardo, 1997: 411). With its roots in European social-movements theory, the NSM paradigm grew out of an observed new trend in post-1965 social struggles that distinguished them from older movements, and eventually travelled to Latin America (Hellman, 1995). The long sought-out working class had failed to materialize as The Revolutionary Subject anticipated by Marxism. Thus, social observers began to search elsewhere for an impetus for social change (Touraine, 1988). Instead of focussing their efforts on the classical issues of economic inequality and redistribution, nascent movements tended to concentrate on quality of life and identity concerns. They also differed from conventional movements in terms of their tactics and internal structures. They avoided institutional political channels to the extent possible, opting instead to use public opinion as their source of political muscle, and they tended to adopt "pre-figurative" organizational structures: they emulated the type of state organization that they wanted to see implemented (Pichardo, 1997: 417). All of these apparent and substantive differences between the "new" social movements and their allegedly "economistic" predecessors (the old, class-based social movements) led to the birth of a new perspective in social-movements theory, the NSM paradigm.

If traditional Marxist approaches imbue (economic) class with too much significance in the formation of social movements, NSM theories tend to overemphasize the role of latent processes of cultural production and signification in social-movement formation, neglecting overt structures and processes. NSM theorists vary somewhat in the degree to which they concentrate on cultural processes as the key to interpreting social movements. Consequently, they disagree about the degree to which structural analyses are capable of accurately understanding and interpreting new social movements. One of the most prominent post-structural approaches to evolve out of the NSM school analyses Latin American social movements through the lens of cultural politics. Alvarez, Dagnino and Escobar, for example, define "cultural politics" as:

... the process enacted when sets of social actors shaped by, and embodying, different cultural meanings and practices come into conflict with each other. This definition of cultural politics assumes that meanings and practices—particularly those theorized as marginal, oppositional, minority,

residual, emergent, alternative, dissident, and the like, all of them conceived in relation to a given dominant cultural order—can be the source of processes that must be accepted as political (Alvarez, Dagnino and Escobar, 1998: 7).

This approach focusses specifically on how groups develop their own subjective conceptions and meanings in opposition to dominant ones and, through this process, articulate political responses to conditions of inequality or oppression. It has been framed, to a greater or lesser extent, in direct response to theories and academic currents that emphasize structural inequality or external factors as the main determinants of social-movement formation. Criticizing the ideological doctrines of neoliberalism for propagating a minimalist conception of the state and of democracy, Alvarez, Dagnino and Escobar have endeavoured to assess the esoteric and often ambiguous territory of cultural production as the root of political transformation.

Whereas NSM theories put forth during the 1980s were often framed around the purported advent of a new and novel trend of identity-based organization fundamentally different from “traditional” (i.e., class-based) forms of social mobilization, Alvarez, Dagnino and Escobar have asserted that the processes of meaning production and identity formation are intrinsic to all social movements. Therefore, the classification of social movements into the contrived/synthetic categories of “old” and “new” is misleading insofar as it does not convey the fact that cultural dynamics and processes occur in all social movements. Even social movements that seem patently class-based in character (such as workers’ movements) are the products of cultural processes, because “collective identities and strategies are inevitably bound up with culture” in all social movements (Alvarez, Dagnino and Escobar, 1998: 7). Yet, Alvarez, Dagnino and Escobar do not deny that there has been a striking transformation in the goals, tactics and ideologies of social movements in the contemporary era. While the aims and methods employed by new social movements vary somewhat from organization to organization, the way in which contemporary social actors interact with and view the state, civil society and other political forces (as well as themselves) has changed notably since the 1960s.

According to Alvarez, Dagnino and Escobar, this change (which originated as a reaction to the hegemony and domination enacted by authoritarian governments, neoliberal politics, and the homogenizing influence of globalization) has involved the fragmentation of previously cohesive political space and the erasure of any one-to-one correspondence between class and political involvement. In other words, in the contemporary era, an individual’s propensity for political action cannot be predicted by his/her economic status, race, ethnicity or any other ascriptive attribute. Instead, individuals unite and mobilize based on collectively constructed meanings, perspectives and identities, or “cultural contestations,” that

challenge dominant political forces and "seek to redefine social power" (Alvarez, Dagnino and Escobar, 1998: 7). In this new context, in which political struggles are (allegedly) no longer based on class position and affiliations, but on cultural processes, relationships between social-movement participants and other actors in the political arena become obscured. The disappearance of discrete actors and structurally determined group identities in Latin American social movements presents a direct challenge to structuralist, materialist and institutional approaches to those movements, throwing into question the previously well-accepted belief that structural inequality was the major causal factor in social-movement formation.

There is no doubt that collective identity construction and the production of counter-hegemonic meanings and symbols play a significant role in social-movement formation. This fact has been clear in Marxist theory since Antonio Gramsci's seminal and classic work on hegemony and revolutionary strategy in the West (1971). The problem is that all too many Marxists have remained in a Leninist, Stalinist, Trotskyite or Maoist, but otherwise pre- or non-Gramscian, stage in their thinking. In social movements, without a cohesive understanding of their common situation and interests, individual members would be hard pressed to launch or sustain an effective struggle against dominant or hegemonic forces, whether economic, political or cultural. Identity construction is a particularly crucial process for members of indigenous movements, whose legitimacy as political actors hinges on their ability to gain recognition of their shared identity and social position in relation to those of dominant groupings (Van Cott, 2000). Yet, that social movements are influenced by culture and collective interpretation should not be understood as an indication that class structural processes are either ineffectual or obsolete as stimuli of social movements, nor should it be taken as evidence that culture and meanings "trump" structural causes in the process of social-movement formation.

Cultural reductionism is particularly problematic in the case of indigenous movements. As John and Jean Comaroff (1985) have argued, ethnic consciousness represents both an autonomous influence that is independently capable of spurring collective action and a form of classification that is closely related to and derivative of structural inequality. Given the close association between cultural and structural processes (empirically demonstrated in the social and economic marginalization of minority peoples throughout the world), a sound approach to understanding and analysing social movements must acknowledge existing patterns of inequality as more than constructions. While waging a collective counter-hegemonic struggle (whether aimed at cultural, economic or political change) certainly involves all of the cultural processes elaborated upon by Alvarez, Dagnino and Escobar, the initial impetus or motivation for such a struggle is not encapsulated by those processes. Rather, it lies in the concrete or "external" expressions of inequality, i.e., "class structural processes" (Otero, 1999) that subject entire segments of a population to unfavourable conditions,

denying them the rights or privilege that other segments of that population enjoy. Just as class structural processes are necessary but insufficient to explain the formation of Latin American indigenous-peasant movements; cultural processes alone are also inadequate to explain their existence.

Gramsci himself stressed the need for a more comprehensive study in the "analysis of situations" and "relations of force" in his work on "The Modern Prince" (i.e., on the construction of the Communist party). In his view, it is necessary to distinguish three "moments or levels" in the analysis: 1) "A relation of social forces which is closely linked to the *structure*, objective, independent of human will, and which can be measured with the systems of the exact or physical sciences" (Gramsci, 1971: 180, emphasis added). On this point, Gramsci is merely paraphrasing Karl Marx's ideas in *Capital*. 2) "A subsequent moment is the relation of political forces; in other words, an evaluation of the degree of homogeneity, self-awareness, and organization attained by the various social classes" (Gramsci, 1971: 181). These ideas come from Marx's political analysis in *The Eighteenth Brumaire of Louis Bonaparte*, and Gramsci went on to elaborate his cultural theory of hegemony on their basis. And 3) "The third moment is that of the relation of military forces, which from time to time is directly decisive" (Gramsci, 1971: 183).

The peculiarity of Gramsci's revolutionary theory for the West is that he went beyond the classic belief that revolution had to go through a frontal, military, final attack on the state. Gramsci considered that in democratic regimes the strategy of "war of movements," or frontal attack, was no longer viable. Instead, the new revolutionary strategy was to be based on a "war of positions" in the various "trenches" of politics and culture, to construct an alternative hegemonic project to that of the bourgeoisie. But a good analysis of situations must still include the three "moments" outlined above.

With NSM's overzealous focus on identity construction and discourse, however, this perspective diminishes the role of state actors and institutions in determining the outcomes of social struggles (Van Cott, 2000; Yashar, 1998; 1999). NSM thereby precludes an analysis of how state characteristics and actions shape social-movement goals, tactics and actions, as well as how social movements might change the character of states. The latter ability is what Otero has called the "subjective moment of struggle" in political-class formation, i.e., when social movements are able to have an effect on change in state policies and even some state structures, from the bottom up.

The Political-Class Formation of Indigenous Peasants in Latin America

We posit political-class formation (PCF) as a process by which civil society becomes strengthened within semi-authoritarian or weak liberal-democratic regimes. It is the process through which direct producers shape demands,

form organizations to pursue them, and generate a leadership to represent them before the state and other organizations. Inspired by Gramsci's classic work, PCF theory is clearly located in a post-Cold War era, one in which the struggle for socialism through violent revolutionary means is essentially over. In this context of neoliberal globalism, the question becomes: How can subordinate groups and classes organize to advance their demands, specifically within a semi-authoritarian or weak liberal-democratic political regime, without becoming co-opted into bourgeois-hegemonic discourse?

Let us begin with Gramsci's expanded definition of the democratic state. Rather than restricting his definition to juridical and political structures, Gramsci usually refers to the state as the sum of "political society," or the realm of domination, plus "civil society," or the realm of hegemony. The less democratic a state, the more it relies on domination. Conversely, the more democratic a state, the more it relies on hegemony, or the consent of its people: Democracy, says Gramsci, "must mean that every 'citizen' can 'govern' and that society places him, even if only abstractly, in a general condition to achieve this. Political democracy tends towards a coincidence of rulers and the ruled . . ." (1971: 40).

Within this conception of radical democracy, one of the central questions becomes: How can subordinate groups or classes become hegemonic or dominant, or at least gain the ability to push for state interventions in their favour? For Gramsci, answering this question regarding subaltern classes requires the identification of two phases, which are part of what Otero calls political-class formation: 1) "Autonomy vis-à-vis the enemies they had to defeat"; and 2) "support from the groups which actively or passively assisted them . . ." in their struggles (Gramsci, 1971: 53). A third point posited elsewhere by Gramsci regards the nature of leadership: lest it be democratic and accountable to its social constituency, demoralization and co-optation may be the result. Too often, the character of leadership does not depend on the leaders themselves, but on the state's action. As Gramsci puts it, "[b]etween consent and force stands corruption/fraud . . . This consists in procuring the demoralization and paralysis of the antagonist (or antagonists) by buying its leaders . . . in order to sow disarray and confusion in its ranks" (Gramsci, 1971: 80 ff.).

With these ideas in mind, we posit that there are three mediating determinations between class structural processes and political-class formation, each with a distinct function in producing social movements. *Regional cultures* are the main force that shapes the objects of struggles or demands. *State intervention* tends to shape the character of resulting organizations for struggle, determining whether they become "bourgeois-hegemonic," "oppositional," or "popular-democratic." *Leadership type* determines the alliances that a (developing) social movement establishes with other groups or classes. Leadership type (and related modes of grassroots participation) may also determine whether class organizations move

beyond a simply "oppositional" stance to become "popular-democratic." A popular-democratic form of class organization results from having a democratic leadership type and offers the greatest chance of reaching the "subjective moment" of political-class formation, in that it enables an organization to shape state interventions in favour of its constituents. So, how does this theory help us understand indigenous-peasant mobilization? Let us first provide a definition of *indigenous* peasants, and then discuss the EZLN and CONAIE as their main political-class representations in Mexico and Ecuador, respectively.

The question of how indigenous peasants are constituted into a political class could conceivably be answered from a strictly economic-class perspective, or from an identity-based point of view. Nevertheless, the distinctiveness of the theory of political-class formation (PCF) presented here is, precisely, that both economic and cultural issues are integral parts of what constitutes classes *politically*. A politically formed class involves elements of both material interests and cultural aspects of identity that result from the relations of production and the relations of reproduction, respectively. Relations of production are defined primarily as relations between exploiters and exploited, while relations of reproduction are, above all, those among the exploited.

For Indian peasants, a key component of the relations of production comprises their relations with other ethnic groups, namely with the dominant groups of *mestizos*, *ladinos*, *cholos*, or whites (the names vary by country and ethnic social constructions). Now, for predominantly subsistence peasants, it may well be that the key relation with the dominant groups takes place through the market, and not through production. In either case, ethnic relations within asymmetrical production or market relations will tend to either reinforce ethnic identities, or force the subordinate ethnic group into assimilation. In Laclau and Mouffe's terms (1985), the antagonism between the two subject positions constitutes their respective identities. The remarkable fact about many Indian ethnicities is that they have resisted assimilation for about half a millennium, despite the fact that they have always occupied a subordinate position.

Regional Cultures, Collective Identity Construction and Indigenous Demands

In contemporary Mexico and Ecuador, ethnicity is part of regional cultures and to this extent plays a role in shaping demands or objects of struggle. In Southern Mexico and much of rural Ecuador, a large proportion of the population is indigenous and, in some areas, people with indigenous ethnicities are actually the majority. One could thus ask: What constitutes the basis of political mobilization for indigenous peasants? Is it their class situation as peasants or their ethnic status as Indians? Once again, our response is that we cannot really separate the two issues, except analytically. That is to say, the full package of demands posited by the CONAIE and the EZLN intends

to redress both material and cultural or identity grievances. Let us turn to how, in each case, these organizations and their grievances have been articulated.

The EZLN and CONAIE as Political-Class Organizations

The EZLN started out as a typical guerrilla organization by launching a frontal attack on the state on 1 January 1994, as the North American Free Trade Agreement (NAFTA) went into effect. After only 16 days of battle, however, it responded favourably to the government's proposal for peace negotiations. Its first communiqué did not even mention the right to indigenous culture as a demand; rather, it focussed on economic and political issues that included: "work, land, housing, food, health care, education, independence, freedom, democracy, justice and peace" (EZLN, 1994). (For a chronology of the EZLN dialogue with the government for the first four years, with Web links to crucial communiqués, see Paulson, 1999.) Yet, in an interview given on 1 January 1994, EZLN spokesman Subcomandante Marcos indicated that NAFTA represented the death sentence for indigenous ethnicities in Mexico. It was also clear from the outset that the vast majority of the EZLN militia and community support bases were Indian.

During the first month after the uprising, most indigenous and peasant organizations in the state of Chiapas manifested their support for the EZLN and their agreement with their goals, if not their means. Soon the EZLN began to reshape its goals and program to explicitly include the demand for Indian rights and culture. In fact, out of four major themes that were to be negotiated with the Mexican government, Indian rights and culture was the first to be addressed (Harvey, 1996; 1998; Gilbreth and Otero, 2001; Díaz-Polanco and Sánchez, 2003). Other major themes included land and economic issues, reform of the state, and women's rights. In preparation for these negotiations, the EZLN launched a national call for an indigenous forum to be held in Chiapas. Thirty-six ethnicities of a total of 56 were represented in January of 1996. The resolutions of this forum were reflected, if not in full, in the San Andrés Accords signed between the EZLN and the government on 16 February 1996 (Hernández Navarro and Vera Herrera, 1998). Another resolution of the forum was the formation of a National Indigenous Congress (*Congreso Nacional Indígena*, CNI), which was organized in October of 1996.

The massive backing of the EZLN by Indian-peasant organizations throughout Mexico was shown once again during its leadership's march to Mexico City between February and March of 2001. Travelling through the most populous Indian regions between Chiapas and Mexico City, the EZLN leadership was received by crowds numbering in the thousands, in each case receiving the symbolic "*bastón de mando*," or command baton, from the chiefs of each regional Indian people. They were on their way to have their hearing before the plenum of the national Congress, which was about to discuss the legislation on Indian rights and culture (and which will be

discussed in more detail later). (See Mexico's newspapers of those months for coverage, especially *La Jornada*, whose Web site includes daily issues going back to March 1996: <http://www.jornada.unam.mx>.)

CONAIE, for its part, is a large umbrella organization that includes a multiplicity of local and regional organizations in Ecuador. It includes Andean Indian-peasant groups, as well as groups of urban and rural artisans, and Amazonian merchants and hunter-gatherer peoples. According to a 1989 study conducted by the department of bilingual education, CONAIE's affiliation rates were 75% of organized Indians (Brysk, 2000: 73 ff.), right before the organization launched a national uprising in 1990. In 1997, CONAIE played a pivotal role in convening and carrying out the work of the "Popular Assembly," a group of civil society organizations that met to compose a new constitution, elements of which were later incorporated into the official 1998 Constitution of Ecuador (including the recognition of collective rights and plurinationality). And yet, CONAIE's coherence has declined somewhat in recent years, as a result of internal splits, co-opted leaders and tensions between leaders and rank and file. Our references to CONAIE regard mostly its climax period as an organization that represented not only, but centrally, Indian peasants in Ecuador. Also, while Luis Macas was one of the most prominent leaders in the early stage of the struggle, other leaders have since emerged with different approaches.

These two organizations are comparable to the extent that they have both become representative of broad and diverse Indian organizations in their respective countries. While the EZLN is a single organization, it has been continuously in contact with other Indian groups to define and redefine its own goals and program, in order to advance the struggle for Indian economic and cultural demands. CONAIE, by contrast, has been an umbrella organization from the outset. Because both organizations attempt to represent fundamental or strategic Indian/peasant interests, rather than merely economic-corporative or short-term interests, we consider that the comparison is methodologically sound. This is true not least because our focal point is, specifically, the political-class formation of Indian peasants, a process that must be centered on strategic group, class, or movement goals.

Regional Cultures and Types of Demands

The types of demands or objects of struggle that we can observe in rural Mexico and Ecuador are primarily: peasant, peasant-entrepreneurial, proletarian, indigenous-communitarian and post-capitalist. Certain cultural orientations correspond to each of these primarily economic labels (Otero, 1999: chaps. 5-7; Jugenitz, 2002; Zamosc, 1994). With relation to the indigenous-communitarian demand, some would argue that this is a post-modern type of struggle, to the extent that it centres on the issue of identity (Esteva, 1999). Nevertheless, because the existence and reproduction of indigenous identity depends largely on access to land, we would argue that

the indigenous-communitarian demand has an economic-class base in the peasantry. Indianness as an identity clearly conditions this demand in that it incorporates at least a partial preference for a communitarian form of production and a specific ethnic identity. This is not an argument for the traditional Marxist primacy of economic-class relations as the basis for political-class formation. Rather, it is an assertion that economic interests are shaped not only by experience in production relations, but also by relations of reproduction (which include household, kinship and community relations). The ensemble of these relations has considerable bearing on regional cultures and processes of collective identity formation. In PCF theory, regional cultures primarily shape the objects of struggle or demands.

Subordinate groups and classes in the indigenous areas of Mexico and Ecuador have sustained ethnic cultural differences for centuries. This does not mean that all current normative systems in indigenous communities are pre-colonial. Anthropologists and historians have demonstrated conclusively that people shape and reshape values and traditions interactively through contact with people from other ethnic groups, especially in resisting dominant groups or classes. Therefore, many or most cultural "traditions" in an indigenous area could be of a recent fashioning (Kearney and Varese, 1995; Kicza, 2000a; Stern, 1987; Wearne, 1996). Yet, they will still be specifically indigenous to the extent that such traditions emerged partially or wholly as ways of resisting the dominant groups in society. Sandstrom (2000), for instance, has concluded that "Indianness" can be summed up in a few features (five in his ideal type), none of which is biological. This emanates from the fact that ethnic identity, like most other forms of cultural identity, is socially constructed. As Sandstrom puts it,

Ethnicity is often situational in that people decide when and how to assert their identity using different strategies at different times. An added complicating factor is that over time a group's self-definition changes to meet new challenges, and the symbols people choose to represent their identity may be modified, created anew, intentionally eliminated, or resurrected from a previous period (2000: 272).

Contrary to a traditional-Marxist view on the subject, then, we cannot regard ethnicity as merely an ideological conception that involves "false consciousness" (e.g., Bartra, 1993; Ortiz-T, 1997). In his reflection on the 1990 indigenous uprising that bolstered CONAIE's position as a national political force, Luis Macas noted that: "We would have to look for [the causes of the 1990 Indigenous Uprising] in the cumulative exploitation and oppression that we Indians have been the object of for nearly 500 years; even today Indians continue to comprise the poorest and most marginalized part of society We believe that a fundamental cause was the existence of mobilizing axes like the defence and recuperation of land and territory, as well as a *clear unity forged by the revitalization of the ethnic identity of the Indian people*" (Macas, 1991: 5, emphasis added).

To the extent that ethnicity and its associated cultural values and traditions have real effects on social action and social life, they should be taken as important social determinants. In the case of the CONAIE and the Zapatista struggles, fighting for the right to Indianness has been central from the outset, or soon after the uprising, respectively. Thus, given the overwhelming support from Indian groups to the EZLN, the symbolic fight for Indian rights and culture became a key rallying point in its struggle, even if it started primarily as a class-based movement.

In turn, this Indian-identity focal point functions as the main rationale behind the fight for autonomy and control over natural resources. Such an arrangement would allow indigenous communities to deal with their own affairs in governance and management of their natural resources (Burguette Cal y Mayor, 2000; van der Haar, 2001; Díaz-Polanco and Sánchez, 2003). This would be done in accordance with their own normative systems. Autonomy is thus seen as the condition for redressing and sustaining indigenous cultural identity. Hence, liberal states feel threatened by contemporary Indian mobilization. Because Indian culture emphasizes community identity and values, it goes well beyond the values of individual rights and individual private ownership. As Rodolfo Stavenhagen has put it, "Demands for the right to autonomy can only be fully understood in relation to a long history of oppression, exclusion and exploitation. Such has been the case of indigenous peoples" (2000: 13).

Expanding National Borders Within: Indian Rights and Citizenship

The discourse on citizenship has rarely provided a neutral framework for resolving disputes between the majority and minority groups; more often it has served as a cover by which the majority nation extends its language, institutions, mobility rights, and political power at the expense of the minority, all in the name of turning supposedly 'disloyal' or 'troublesome' minorities into 'good citizens' (Kymlicka and Norman, 2000: 11).

[I]n so far as the historic conquest of indigenous peoples and the stripping of their self-government rights were grounded in racist and imperialist ideologies, then restoring rights of self-government can be seen as affirming the equal standing and worth of indigenous peoples. In these and other ways . . . far from eroding equal citizenship status, "the accommodation of differences is the essence of true equality" (the last phrase is a quotation from a 1986 judgment of the Canadian Supreme Court interpreting Canadian constitutional provisions for equality, Kymlicka and Norman, 2000: 33).

The purpose of this section is to clarify some of the key conceptual and normative issues on Indian rights and citizenship. Our general question is: How can Indian demands for group rights and culture be accommodated in lieu of justice and citizenship, while respecting the rights of others? We

base our discussion partly on a critical review of Will Kymlicka and Wayne Norman's recent general discussion of this subject (2000). The importance of these Canadian political theorists' work, particularly Kymlicka's (1995), resides in the fact that it has been influential in liberal and postliberal academic circles throughout the Americas, as well as in Europe and elsewhere (Kymlicka and Opalski, 2001). By juxtaposing their largely establishment-friendly perspective with our bottom-up theory of political-class formation, we hope to contribute to establishing better grounds for further dialogue between states and Indian-peasant movements in the negotiation of how to expand national borders from within. We start with some Latin American perspectives on what some postliberal views of the nation look like.

The challenge for the liberal state is to move from a vision of its constituents as individuals only, to one that also acknowledges some notion of group or "ethnic citizenship" (de la Peña, 1995; 1999; 2002). Ethnic collectivities would have to be considered as subjects of public rights, with autonomy and self-determination being critical among them, as allowed for by the 1989 Convention 169 of the International Labour Organization (to which both Ecuador and Mexico are signatory states, Van Cott, 2000). Rather than losing territory, the nation-state gains in its ability to be more inclusive of people that have long been marginalized from the benefits of national "development." For Luis Villoro, a Mexican philosopher, the point of acknowledging Indian peoples would not be to return to the ancestral, pre-modern, Indian community, which imposed its collective prejudices over all its individual members. A modern community would have to base itself on "the unrestricted protection of fundamental personal liberties, which would not be violated by any communitarian decision" (Villoro, 2001: 28).

EZLN's Comandante David expressed his idea about a postliberal, multicultural democracy very eloquently in the Tzotzil language in 1995: What Indians want, he said, is "to live in a world where all the worlds fit." The vision of a plurinational state put forth by CONAIE resonates strongly with the EZLN's concept of a world where all the worlds fit. In 1990, following the indigenous uprising that put CONAIE on the map as a political force, CONAIE President Luis Macas presented Ecuadorian President Rodrigo Borja with a new agenda, asking for a constitutional amendment declaring Ecuador a "pluri-national, multi-ethnic" state (Egan, 1996: 133). Plurinationality, as CONAIE conceives of it, entails legal recognition from the state of the cultural and social distinctiveness of Ecuador's indigenous peoples, including their identities, institutions, values and norms, and approaches to social order. For Macas, consolidating this objective entails not only the continuous pressure of Indian peoples from below, but also "a social compromise" among other sectors of society that are committed to pluralist democracy, justice, and peace (Ortiz-T, 1997: 36).

In Ecuador, "plurinationality" has been incorporated into the constitution, thanks to CONAIE's struggle (Brysk, 2000). Yet, no enabling laws to implement the general concept have been passed. In Mexico, a dramatic

advance on Indian rights and culture was achieved on paper in the San Andrés Accords between the government and the EZLN in February 1996 (Hernández Navarro and Vera Herrera, 1998). But then a long impasse ensued. While a 2001 constitutional change acknowledged Indian peoples, the most critical issues in regard to the nature and extent of autonomy and self-governance were left to be defined by state legislatures. Therefore, this legislation was rejected by most Indian organizations, including the EZLN. Failing to federally grant autonomy to Indian peoples, and to consider them subjects of public rights, leaves their lands and territories open to capitalist development and exploitation without their having any say on the matter (Harvey, 2002). After almost two years of silence, in protest to this spurious legislation, the EZLN support bases launched a massive demonstration, taking over the highlands city of San Cristóbal de las Casas, Chiapas on 1 January 2003. More than 20,000 indigenous men, women and children, many with machetes in hand, filled the central plaza for more than three hours, during which seven EZLN commanders spoke to the masses (Bellinghausen, 2003).

How can states and Indian peoples move toward a resolution of their antagonisms and impasse? Although phrased in slightly different terms, the ideals of plurinationality and acceptance of cultural difference are contained in the notion of "multicultural integration" proposed by Kymlicka and Norman (2000). Given that these authors have theorized this issue mostly in regard to more advanced liberal democracies, their conceptual and normative apparatus no doubt represents a considerable challenge for implementation in emerging democracies like those of Latin America.

We argue that the main challenge is twofold. First, there is the ideology of the ruling classes. Recent legislation reflects the refusal to grant significant Indian rights, or to move them beyond the constitution into enabling laws. The 19th century idea of the nation as a culturally homogeneous entity (Hale, 1996) is thus still alive and well. Even "left" modernists advocate promoting capitalist development as the means to assimilate Indian peoples (Blanco, 2001). The question, to be addressed shortly, is: To what extent can this ideology be transcended by the ruling classes, so as to accommodate difference? The second challenge for the ruling classes has to do with the fact that redressing Indian demands includes going beyond recognition and granting of rights to Indian culture; it also requires, in many cases, the redistribution of land as a condition for its reproduction. In this section we will only address the first challenge, which has to do with the ideological and normative aspects of Indian rights and citizenship.

Indian rights and citizenship have been central in two major debates concerning political theory in the 1990s, one about minority rights and multiculturalism, and the other about citizenship and civic virtue. To a large extent, these have been separate debates, yet advocates of minority rights and citizenship have shown some mutual suspicion (Kymlicka and Norman, 2000). Defenders of minority rights suspect that appeals to some

ideal of "good citizenship" necessarily entail subordinating minority rights to majority rule (Samson, 1999). Conversely, promoters of robust civic virtue and democratic citizenship suspect appeals to minority rights as reflecting the narrow self-interest that they seek to overcome. Despite such suspicions, argue Kymlicka and Norman (2000), any attractive and plausible political theory must attend both claims. A synthesis of these authors' attempt to do so follows.

The Debate on Minority Rights

This debate has seen two waves, the first of which was focussed on "justice" claims by minorities for accommodation of their cultural differences. The second, to be dealt with below, has to do with the articulation of justice for minorities in citizenship issues. According to prevailing liberal ideology, justice requires state institutions to be "colour-blind," or "difference-blind." In this view, assigning rights or benefits on the basis of membership in an ascriptive or culturally different group is seen as morally arbitrary and inherently discriminatory. It will necessarily create first- and second-class citizens.

Thus, the first task confronting any defender of minority rights was to "show that deviations from 'difference-blind' rules that are adopted in order to accommodate ethnocultural differences are not inherently unjust" (Kymlicka and Norman, 2000: 3). The problem with "difference-blind" institutions is that, while they purport to be neutral, they in fact are tilted toward the needs, interests and identities of the majority group. The adoption of minority rights, therefore, is required to help remedy their disadvantages. In our case, if Latin American states fail to recognize and respect Indian culture and identity, the result can be serious damage to their self-respect, and even to their sense of belonging to the larger, "transcendent" national identity. The idea here is that, by granting recognition, Indians can both reproduce their cultures and better integrate into the nation.

Need for an Integrated Theory of Diverse Citizenship

Another concern by advocates of citizenship is that granting minority rights may weaken larger citizenship rights, e.g., by seeking secession. This was Mexican President Zedillo's excuse to renege on the San Andrés Accords in December 1996. Kymlicka and Norman's main conclusion in this regard is that, in most cases, minority rights can be safely introduced while actually *strengthening* citizenship. But this is really an empirical question, they warn, which must be addressed on a case-by-case basis. The world problem in relation to this matter is pointedly brought to light by the following figures: There are 5,000 to 8,000 ethnocultural groups and only about 200 states, of which 90% are multiethnic (Kymlicka and Norman, 2000: 13). Hence the need for methods of "managing" ethnic conflict.

These methods include now-illegitimate measures that try to eliminate ethnic conflict, in some cases physically, through such means as genocide and forced mass-population transfers, or via assimilation or hegemonic control. Even partition and/or secession are seen as problematic, to the extent that these methods merely transfer the ethnic conflict to the new entity. Therefore, multicultural integration is the most viable and just method to eliminate or reduce ethnic conflict. Both multicultural integration and assimilation involve the fashioning of a transcendent identity. Yet multicultural integration is preferable, because it does not require, *as assimilation does*, the elimination of subcultural groups' identity.

Now, how is diversity to be respected in a pluralistic society, without also "damaging or eroding the bonds and virtues of citizenship" (Kymlicka and Norman, 2000: 17)? The peculiarity of indigenous peoples, say Kymlicka and Norman, is that they usually seek "the ability to maintain certain traditional ways of life and beliefs while nevertheless participating on their own terms in the modern world" (2000: 20). This point highlights the non-antagonistic nature of indigenous cultural rights claims within a liberal democracy. It neglects, however, the fact that Indian struggles usually include the demand for land and territory, which are critical conditions for their cultural reproduction. This point may indeed become antagonistic, at least with some local or regional fractions of ruling classes. In these cases, the state can act for the larger good of society by engaging or completing a land reform process, even if it must compensate expropriated landowners.

Conclusions

From the preceding discussion, we can arrive at three conclusions: one theoretical, one substantive, and one normative and policy-related. First, we need a synthetic theory like PCF to understand and explain contemporary social movements whose demands involve both material and identity issues, which is definitely the case for Indian-peasant movements.

Second, Indian-peasant struggles represent a significant challenge to national borders from within, to the extent that they run directly counter to some key ideological elements of neoliberal globalism. To successfully integrate Indian peasants into national development as equal citizens, in the terms posited by their own organizations, requires that nation-states go well beyond a merely liberal-democratic regime. Nations must expand their borders within in order to accommodate their Indian peoples.

Third, we have provided a conceptual and normative discussion on the basis of which states and Indian-peasant movements can advance in their dialogue to implement substantive state reform. The key point that ruling classes must understand is as follows. The ancestral dynamic of struggle between Indian peoples and Latin American states has involved a dialectic of opposites for half a millennium. It is always possible for states to keep repressing these populations and/or buy off their leadership or otherwise

co-opt their movements. But this approach merely displaces antagonism and conflict into the future. At least with regard to Indian peoples in contemporary capitalist societies, there is a clear prospect of resolving the main antagonisms by expanding currently hegemonic frameworks and, yes, by affecting some fractions of the ruling classes' material interests. Once such antagonisms are resolved, however, it is quite conceivable that a new dynamic may ensue, one based on a "dialectic of the diverse," rather than a dialectic of opposites. The pay-off for all will be that a larger proportion of citizens and social groups will live in more integrated, participatory, cohesive, egalitarian, deliberative, democratic and just societies.

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