



# Towards a theory of dependent democracy

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## Abstract

Democracy is seen today as being in erosion or crisis both in the Global North and South. This article puts forward the concept of ‘dependent democracy’ in order to explain that much of the lack of success of democracy in the South in guaranteeing political participation and economic inclusion and wellbeing for the majority of the population is due to a specific tendency of democracy there. Adapting some insights from the more economics focused Dependency theory towards a more contemporary point of view from political sociology and international political sociology, dependent democracy is understood as a democracy that exists in a subaltern position within the hierarchical, post-imperial and neo-imperial global capitalist order. Dependent democracies thus tend to be less ‘democracies’ and more ‘oligarchies’ within a form of government in the South that can be understood as existing in a global pyramid of semi-peripheries, middle peripheries and outer peripheries.

## Keywords

democracy, dependency theory, Global South, imperialism, political sociology

## Introduction

Democracy is considered today as being in erosion or crisis all over the world both in the Global North and the Global South. The literature shows that many of the tendencies observed in the North also exist in the South – rising authoritarian political movements, restriction of politics in technocratic elites, enlargement of influence of business and international entities over electorates and rising political apathy. Nevertheless, there is an important difference in the South, which is that we have many nation-states in Asia and Africa that only gained independence and started building their states and

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democracies in the period between the 1950s and the 1970s, while in Latin America democracy only became the dominant regime of politics in the 1980s (even though those countries became independent in the early to mid-19th century). In the 1980s, these efforts of state and democracy building in this region were already experiencing important problems related to austerity neoliberal economics, which actually continues to dominate economic policy all over the world to this day.

Those conditions exist within a global legal and political set of institutions and organizations that were created within post-imperial legacies and neo-imperial interventionism of countries from the North. In this article, it is proposed to understand dependency as a global political convergence made of local rich sectors, an elitist oligarchic state and a global neo-imperial alliance (hegemonized or led by the United States) made of corporations, states, multilateral institutions (such as the International Monetary Fund (IMF) and the World Bank) and non-governmental organizations (NGOs) based in the North. While this alliance or convergence of actors exists in the Global South large parts, or often the majority of the population, are limited in their economic and political inclusion through the logic of dependent capitalist development of low industrialization, which tends to create a large politically dispersed population working in the ‘informal’ economic sector. Thus, it is proposed here that those circumstances create ‘dependent democracies’, which tend to function less as ‘democracies’ and more like ‘oligarchies’ – a mode of rule in which public office holders govern with a view to the private interest of the wealthy (Cameron, 2021). This occurs within a form of government that can be understood as existing in a global pyramid of a core, a semi-periphery, peripheries and outer peripheries (joining thus concepts from Dependency theory, World Systems theory and Critical International Political Economy) in which the lower we go the more dependent situations we will find.

A dependent democracy can be defined as the democratic system of a country that exists in a subaltern position within the hierarchical, post-imperial and neo-imperial global capitalist and political order. The concept adapts insights of Latin American dependency theory in a way in which their primarily economic foci are more decisively adopted here for a contemporary perspective on global democracy. It is argued that the main limitation of Dependency theory was a lack of direct analysis of the political, the state and democracy due to its focus on economic development. This article thus wants to correct this oversight by putting in dialogue Dependency theory with more recent views on democracy (both mainstream and critical political science as well as critical sociological Latin American views on it).

The concept of dependent democracy aims to put forward an alternative approach to mainstream political science theories and analyses of democracy that are based on liberal theories of pluralism as well as on behavioralism and rationalism, which tend to ignore the historical, socio-structural, economic and global realities around modern democratic systems to mostly focus on national factors (‘methodological nationalism’). This approach is taken in order to highlight how the combination of internal and external socio-structural power sabotages democracy in the Global South.

The article begins with an overview of the context of emergence and the main arguments of Dependency theory in the 1960s–70s. From there, the next section goes into a discussion on how democracy has been analyzed both in the Global North and

Global South while relating that with some main insights of Dependency theory. Finally, the article outlines key premises for a theory of dependent democracy within a wider theoretical proposal that combines a global ‘geohistorical’ perspective and a ‘historical-structuralist’ analysis of modern representative democracy.

## **Economics and politics in Dependency theory**

Dependency theory has to be understood within the mid-20th-century convergence of the Cold War and the process of decolonization of Asia and Africa. The concept and project of ‘development’ was proposed around the 1944 establishment of the Bretton Woods system, the World Bank and the IMF. There for Grugel and Hammett (2016: 7) mainstream understandings of development were ‘consequently, fixed to the geopolitical strategies of the West’ but for them the theoretical path towards the concept of development was also marked by the studies of Karl Marx and his followers within their analyses of the spread of global capitalism. Shortly afterwards, within an era of US social sciences dominated by Talcott Parsons’ functionalism, Modernization theory emerges mainly in that country and it takes shape as a proposal of stages of economic development in the theory of Walter Rostow in his book *The Stages of Growth: A Non-Communist Manifesto* (1960). For Rostow, economic development is a process in which a country begins as a ‘traditional’ society and seeks to end up as a modern industrial society characterized by mass consumption and high living standards in the model of the US and Western European industrialized Welfare States of that era. A more political theory of modernization also rose to propose a model, of what would later be even called briefly ‘political development’ (Almond, 1970), after the work of political sociologist Seymour Martin Lipset in his *Political Man* (1960) where he proposes that a stable democracy requires a stable economy based on economic and political inclusion of the lower classes within economic growth or ‘economic development’. Modernization theory in that sense became the main theoretical base of the growing global initiatives of development aid and later of what came to be called ‘democracy assistance’ and ‘democracy promotion’ (Christensen, 2017).

The aforementioned ideas were heavily promoted and applied around the world by the global leadership of the USA. Nevertheless, the political processes and struggles of Latin America around inclusive developmentalist and ‘populist’ governments, as well as the decolonization and early state building processes of Asia and Africa started to motivate the creation of more ‘southern-based’ theories of economics, politics and international relations. In 1949, the director of the Latin American and Caribbean Economic Commission (ECLAC) Raul Prebisch launched what would become known as Latin American economic structuralism or the ECLAC economic school of thought. For Prebisch, the economic development of countries of what he called the ‘periphery’ of the world’s capitalist economic system (the Global South) had as obstacles towards that an unequal exchange relation with the countries of the world’s ‘core’ (the industrialized countries of the Global North) due to their reliance on primary exports against the manufactures of the core. The solution towards solving that obstacle was the economic policies of import substitution. This southern-based theory thus entered into conflict with Modernization theory, mainly in its rejection of methodological nationalism in order to

point out to the global structure and its determination of national economies. It showed that the countries of the Global South analyzed by Modernization theory were in fact part of a bigger international and unequal system of states and economies, and as such they were determined by their peripheral position in their quest towards economic development.

Still, in the 1960s Latin American 'developmentalism' was space for the coexistence of Modernization theory and ECLAC economic structuralism. Other theoretical influences were also starting to gain attention within the larger global geopolitical struggles, especially those related to the decolonization of Africa and Asia and the Latin American political context after the Cuban Revolution in 1959. The US Marxist economists Paul Baran and Paul Sweezy produced influential theories of capitalist growth, development and of 'monopoly capitalism' in the 1950s for Dependency theory (Bambirra, 1978: 15–16). Baran's (1957) work was particularly noticeable, as he argued that capitalism in the periphery failed to provide prosperity for the majority of the population due to a distribution of the economic surplus, which did not transform into capital accumulation but into elite consumption, that is, rents for big landowners and foreign shareholders. Meanwhile, discussions on imperialism and colonialism were also taking place around the world, in both leftist political parties and academic sectors of the Global South (Dos Santos, 2011 [1978]: 397–423). At the same time, developmentalism and import substitution policies were coming into increasing trouble in the region under both economic low growth and within the pressure of US interventionism and military dictatorships in the context of the Cold War. Also, in the 1960s Kwame Nkrumah (1965), an anti-colonialist leader and the first president of independent Ghana, contended that the main challenge of post-colonial states was the growing alliances of their economic and political elites with ex-imperialist and rich states and corporations. He argued that these alliances would end up producing a new kind of post-colonial subalternized relationship between countries of the Global South and those of the North, which he called 'neo-colonialism'.

A theoretical proposal with similar features to that of Nkrumah, which became known as Dependency theory emerged in the mid to late 1960s through dialogues between economists and sociologists of various South American countries who were working in Brazil and Chile. It arose in opposition to both Modernization theory from the USA and to the 'theory of stages' of communist parties aligned with the USSR, as well as to the developmentalism from the ECLAC. The criticism of the 'dualism' of Modernization theory – which talked about almost separate national 'modern' sectors coexisting in the same national territory with 'traditional' or underdeveloped ones that lacked a modern 'culture' – was already present in the work by Mexican anthropologist Rodolfo Stavenhagen, *Seven Erroneous Theses about Latin America* (1965). In this publication, Stavenhagen explains that both of those sectors were in fact connected by relations of exploitation and oppression of the second by the first ones, which is an arrangement that enhanced national unequal development. He saw that in Latin America there has rarely been a national 'progressive' capitalism leaning towards the inclusion and improvement of the conditions of life of that oppressed and marginalized sector. He also noted that the bourgeoisie did not tend to have a contradictory relationship with big landowners in the region so that we could think this national bourgeoisie could lead a process of national inclusive development.

The main early text of Dependency theory was that of German-born but also then resident of Mexico Andre Gunder Frank with his *Capitalism and Underdevelopment in Latin America* (1967) in which he argued that Latin America was a capitalist region since becoming a colony of European countries and, in consequence ‘underdevelopment’ was a product and part of capitalist development itself. Such work had an important precedent in the historical work of Sergio Bagú from the 1940s–50s who introduced the concept of ‘colonial capitalism’, which pointed to how Latin America under colonialism found itself in a situation of subordination to colonial powers but inside the growing global capitalist market and so that it could not be characterized as having a feudal system.

Dependency theory also used Prebisch’s concept of core–periphery to put forward the idea that underdevelopment and mass poverty was a result not of endogenous situations only. For Prebisch, underdevelopment was produced by a global capitalist system in which national rich classes of the South allied with peripheral oligarchic states, foreign companies and imperialistic states from the core to establish a socio-economic and political system of subordination to this social arrangement in the periphery. More specifically, Cardoso (1979 [1971]) pointed to how the condition of dependence creates specific situations not just in the economic but also in the social and political system of countries, thus requiring a sociological-oriented approach of analysis. Theotonio Dos Santos (2011[1978]) saw that the primacy of commercial and technological capital and the growing importance of transnational corporations were central to understand the economic and political domination of core countries over peripheral ones and their underdevelopment. The work of Marini (1973) on the other hand proposed the concept of ‘superexploitation’ to show how workers in the periphery were exploited by the global unequal exchange arrangement to the advantage of the Global North through intensive work, long working hours and low salaries. Evans (1979) proposed that a ‘triple alliance’ existed composed of foreign capitals and states from the core, with rich national sectors and state elites from the peripheral country, which is what sustains that subordination in that region.

The Peruvian sociologist Anibal Quijano, as well as José Nun, proposed since the late 1960s a confluence of Dependency theory with the rising Latin American concept of ‘marginality’ and from there they established a critical point of view of the views of Modernization theory on the growing poor urban population of Latin America. For Quijano (1974), the dependent nature of capitalist development in Latin America determined that people from rural areas had to continuously migrate to the cities to escape poverty in order to enter the larger urban marginal sector. Industrialization and high technology occupations in the receiving areas were not adequate in size to absorb the incoming population. As a consequence, the urban economic and political system did not have the capacity to give them formal employment, adequate urban living conditions or means of political participation. Consequently, this new population would exist outside the main spaces of capitalist employment – or what Quijano called the ‘hegemonic pole’. In such a situation, the marginal pole lives outside that economic hegemonic pole, and unlike what Marx’s ‘industrial reserve army’ concept suggested, the marginal pole would not even have the opportunity to enter the sphere of formal employment at some point since it inhabits a place of permanent marginalization outside of the interests of capitalist accumulation of that hegemonic pole.

Dependency theory motivated an important debate in Latin America in the 1970s around the concept of 'modes of production', while also influencing a tendency of international relations thought around the concept of 'peripheral autonomy' (Jaguaribe, 1979). Dependency theory found a new niche and became influential outside of Latin America in the work of the Egyptian Marxist Samir Amin as well as in what later would become known as World Systems theory.

The politics of Dependency theory saw Gunder Frank and the Brazilians Theotonio Dos Santos, Vania Bambirra and Ruy Mauro Marini aligned with a Marxism–Leninism inspired by the experience of the Cuban Revolution. On the other hand, Fernando Henrique Cardoso and Enzo Faletto provided a more 'reformist' and sociological, but also Marxism-influenced view, of Dependency theory similar to the previous views of USSR aligned communist parties. Cardoso and Faletto argued for the political goal of development of capitalism under a reformist developmentalist government in representative democracy and against the human costs of guerrilla insurrectionism, even though Cardoso would later abandon Marxism altogether towards embracing social democracy in the 1980s and even neoliberal economics when he became president of Brazil in the 1990s. On the more pro-insurrectionist side, Vania Bambirra (1973) produced a more political-strategic and historical work on the experience of Cuban history towards the revolution of 1959. That work in hindsight can be seen as remarkable in its processual point of the historical political evolution of rising progressive or revolutionary organization and subjectivity. However, it can be argued that its political implications can hardly be translated to the current political era of Latin America, where the strategy of armed insurrections has been mostly abandoned by the left due to the human costs associated with engaging in military action and the difficulty of having lower and middle classes getting involved in armed warfare against the state. Besides all of this, the main tendency of Dependency theory was to not involve itself too much in political theory or strategy in order to focus itself on economic argumentation with some sociological considerations.

The intellectual and political landscape of 1980s Latin America changed in such a way that it mostly went against the relevance and popularity of Dependency theory. Laclau and Mouffe (2001 [1984]) proposed a 'post-Marxism' view that rejected sociological and economic structuralism and Marxism itself, to embrace post-structuralist emphases on 'discourse analysis' to understand politics. Post-structuralism will also be the base for later theories of post-modernism and post-colonialism while theories of New Social Movements called to displace from the center the Marxist emphasis on class towards studies around gender, race and identity. Meanwhile, a rising international 'political science' continued its impulse under the very US-centric views of quantitativist behavioralism, liberal pluralism, Robert Dahl's 'poliarchy' and the 'democratic elitism' of Schumpeter (De Sousa Santos and Avritzer, 2007: xxxvii–xlii). In economics, both Marxism and Keynesianism lost importance with the rise of the economic liberalism of Hayek and Friedman in the midst of the fall of the Berlin Wall. It thus can be argued here that a point of convergence in the seemingly divergent intellectual currents discussed above was their anti-Marxism and anti-structuralist approach, de-emphasizing or leaving behind class analysis and a strong tendency to separate the political from the social and economic.

## **Democratization and democracy in crisis and erosion in the Global North and Global South**

Transitology theory brought to Latin America in the 1980s the previously mentioned mostly US created political science, which analyzed and advised the transition to democracy in the region. But while the end of military dictatorships and return of democracy brought initial positive expectations in Latin America, the 1980s there later became known as the ‘lost decade’ due to widespread regional economic instability linked to high inflation and high external debt of states. A late work of Dependency theory did appear in the early 1980s addressing the scenario and its economic problems, in what it called the ‘new dependency’. Furtado (1985 [1982]) argued that the loss of autonomy in economic policy for Latin American states within a mandate to manage a large foreign debt with economic policies of austerity, due to pressure from the IMF and the international financial system and with neoliberal economics, as both a ‘rationalization’ of that process and a policy mandate. Nevertheless, with the crisis of Keynesianism, social democracy and Marxism, the 1980s are now deemed as a decade of ‘double transition’ towards both democracy and neoliberal economics in Latin America.

The region in the 1990s experienced an important erosion of popular enthusiasm around democracy within a growing political culture of ‘anti-politics’, which in a large part was provoked by the continued economic instability and growing poverty and inequality in the middle of the highest point of implementation in the region of the ‘Washington Consensus’ through the interventions of the IMF and the World Bank. That situation created a growing anti-neoliberal coalition of diverse social movements, which were able to bring down through mass street protests elected neoliberal presidents in Argentina, Ecuador and Bolivia in the early 2000s, and which in the 2000s–2010s was able to create a very singular – from a global point of view – regional wave of leftist and progressive governments.

Lynch (2020: 81–3) follows the also Peruvian political scientist Carlos Franco (1998) in arguing that Transitology theory was an important feature of what they see as the ‘regression’ of the social sciences in the region due to their abandonment of critical thought and ‘historic-structuralist’ views of ECLAC and Dependency theory. For these authors, Transitology theory imposed a conservative view of democracy that blocked the questioning of the neoliberal economic policies that were being applied throughout the region. But Franco (1998) in particular lamented how Latin American social sciences in the 1980s–90s left behind Dependency theory in the same period of time that the region for him became actually ‘more dependent’ than before. Political science in the region mostly carried on with the behaviorist, quantitativist, US originated liberal ontological and methodological assumptions. Munck (2010: 576–7) sees a historic sequence in that discipline in Latin America which went from Transitology theory to research agendas and concepts of ‘democratic consolidation’ in the 1990s and with ‘quality of democracy’ frame of analysis in the 2000s and onwards. Critical views of democracy in the region such as that of ‘low intensity democracy’ (Gills and Rocamora, 1992) appeared but were not given as much attention in the 1990s as those other mainstream views. In a retrospective review of Transitology literature Møller and Skaaning (2013: 141) explain that the theory tended to underestimate socio-structural realities inside an agent-centered

enthusiastic view of democratic transition eager to bring democratic change. For these authors, the poor results of democratic performance in the 1990s in Latin America show that when the structural conditions are 'inauspicious', transitions have produced 'minimalist' forms of merely electoral democracy.

The views of Dependency theory kept on being developed outside Latin America after the 1980s by World Systems theory, with its contribution of the concept of the 'semi-periphery' as a middle situation of countries between the core and the periphery. Within that perspective Andreasson (2001) does a comparative analysis of 'semi-peripheral' South Africa and the more 'peripheral' Zambia in the 1990s in their transitions towards democracy. The study shows how more peripheral countries tend to face greater pressure from the world's core towards economic liberalization and democratization than semi-peripheral countries, which tend to have a larger territorial extension, more economic resources, stronger states and civil societies and as such are able to implement political and economic changes 'on their own terms'. Also from a World Systems perspective, Clark (2013) undertakes a more quantitativist comparative analysis of 161 countries within the period of 1972–2008 to find that significant gaps in democracy between core and peripheral countries were not dissipating over time but instead they were growing slightly. He adds that 'despite the global spread of democracy, world-system boundaries remain fundamental in hindering cross-national convergence' (Clark, 2013: 367).

On the other hand, while Dependency theory mostly stopped being produced in Latin America in the early 1980s, a line of thought on democracy emerged in the region influenced or centered on the work of Antonio Gramsci around intellectuals like the Argentinians Juan Carlos Portantiero and José Aricó, the Brazilian Carlos Nelson Coutinho and the Bolivian René Zabaleta Mercado. For these and other related authors, the concept of the 'national-popular' was central in order to deal with the lack of popular inclusion in the state and the nation (the 'national') in societies with small or dispersed civil societies and politics and low development of capitalism and industry. All of this focused towards thinking on the production of a 'national-popular will', which will correct that. More recently Lynch (2020) incorporated the concept of the 'national-popular' to oppose both the concept of 'populism' as well as the mainstream form of analyzing democracy in political science centered on 'political elites'. He argues for a 'historical-structuralist' view in which democracy in the region emerged not from the Eurocentric recipes of Modernization theory or from what he considers as the 'elitist' mainstream political science views of it, but from 'national-popular' struggles and processes of democratization. In those struggles the rich tended to mainly oppose democratization or even opt for authoritarian regimes with more recent examples promoting 'procedimental' elitist forms of democracy, which only allowed for a neoliberal political economy aligned with the 'Washington consensus' promoted by the IMF and the World Bank. It can be argued here that with this perspective Lynch corrects a possible 'nationalistic' emphasis of previous Latin American Gramscians by arguing for a new engagement of views of the 'national-popular' with the more globally aware Dependency theory. He does this by proposing that for Latin American countries and, more widely, the Global South 'nationalization' and 'democratization' imply 'decolonization' to create a truly 'national or plurinational state'<sup>1</sup> (Lynch, 2020: 34).



Those Latin American Gramscians also tended to be critical of the focus Dependency theory placed on the Cuban Revolution and the more global armed path of ‘national liberation’ of the previous decades. Seeing that the conditions after the 1980s were now mostly closed for what Gramsci called ‘war of maneuver’ (insurrectionism), the focus then had to be on ‘war of position’, meaning fighting for a new socialist hegemony within politics and civil society against the hegemony of the bourgeoisie and right wing (Lynch, 2020: 20). It can thus be argued here that the discussions of Latin American Gramscians had a closer spirit to the position of Cardoso in the 1960s and 1970s within Dependency theory.

While these discussions happened around democracy within the more mainstream or ‘critical’ discussions of the social sciences in the 2000s, in the Global North – the model of democracy of Modernization theory for the South – there appeared the concept of ‘post-democracy’. Crouch (2004) explains that post-democracy consists of a situation in which elections keep happening and governments change but politics are increasingly determined by the more ‘private’ interaction between technocratic elites in governments and elites that tend to represent big business interests. He sees there is little hope for policies of an egalitarian or redistributive nature as far as wealth or power goes, or for the restraint of powerful interests. This is the case given that there is also a decline in the power and size of workers’ unions, which leaves much of the ordinary working people as a fragmented and politically passive population unable to generate new organizations to articulate their demands. More recent literature alludes to ‘authoritarian liberalism’ (Bonefeld, 2017) and ‘authoritarian neoliberalism’ (Tansel, 2017) as forms of implementing liberal economics through restrictions of democracy with a strong repressive state. A different literature also exists now that argues that anti-state neoliberal discourse opened the political field for far right movements and governments (Brown, 2019). There are also analyses of the views of economic liberalism, which point to how there exists deeper philosophical open rejection or opposition to democracy or democratization (Arneson, 2018; Brown, 2019).

Pendakis and Szeman (2014) note that after the great recession of 2008 there has been an increasing questioning of mainstream liberal political and economic theories in the Global North due to its rising inequality, unemployment and ‘financialization’, and that the US invasion of Afghanistan and Iraq also ‘opened many eyes’ to the reality of neo-imperial militarism. For Pendakis and Szeman those ‘material’ and economic realities linked to the exercise of concentrated economic and political power gained visibility against the tendencies in the social sciences of past decades, which had a view of power and politics focused on ‘micro-oppressions’ within the views of the previously mentioned theories of post-structuralism and New Social Movements. These developments have been seen as motivating since the late 2000s a revival of Marxist studies in the North in the 2010s (Musto, 2020; Pendakis and Szeman, 2014; Vidal et al., 2019).

The following sections will combine the insights of Dependency theory with these discussions around democracy from recent decades into a particular view of what will be called here ‘dependent democracy’ as a proposal of a concept and view about democracy in the contemporary Global South.

## **Dependent democracy within a wider theoretical proposal for historical-structuralist analysis of democracy**

### *A global geohistorical context for the concept of dependent democracy*

Democracy is a concept in constant contestation and its particularity is that it intends to be a government of the many rather than of the few in line with the Greek word *demokratia*, which can be translated as ‘rule by the people’, and in distinction to aristocracy (‘rule by the best’), oligarchy (‘rule by the few’) and monarchy (‘rule by one’). Democracy has not always been a word with a positive connotation, being at times for certain thinkers and elite social actors a pejorative term for bad or ‘tyrannical’ form of governments, or governments of the uneducated masses, the poor or the majority (Møller and Skaaning, 2013: 2–5). Modern and national representative democracy, specifically, can be seen as one possible mode of political regime alongside others that have existed in modernity such as empires or dictatorships. What makes it distinctive is the particularity of it as it has mostly abandoned intentions of direct democracy in order to focus on representation of the people through elections of governments, members of parliaments and other state officials. Cameron (2021) sees that oligarchy is a mode of rule in which public office holders govern with a view to the private interests of the wealthy and also that a mix of oligarchy and democratic elements is inherent in any ‘constitutional democracy’. But Cameron (2021: 775–6) adds that oligarchic modes of rule are intensified ‘when the institutional mechanisms of representation and participation cannot effectively balance or restrain elites, thereby weakening citizenship rights’.

Democracy became the dominant political system around the world in the mid-20th century with a tendency towards bourgeois hegemony and struggle against that from classes below it (mainly the working and middle classes). Welfare State capitalist democracy has been a minoritarian arrangement as seen from a global perspective both from the point of view of space and time. It has existed mostly only in Western Europe, Australia, New Zealand and Canada, Israel and with many fewer social benefits and protections in some East Asian countries and the United States. Beyond these cases, most of the world’s democracies have been in practice oligarchic plutocratic regimes of minimal restricted individual and social rights with large sectors of sub-proletariat marginalized populations with very limited political rights and representation – much smaller than what has been available for the lower classes of Welfare State capitalist democracies. The emergence of a neoliberal capitalist tendency after the 1970s created a situation in which large sectors of the lower classes belonging to ‘Welfare State’, northern, core capitalist democracies converge with that sub-proletariat of the South in conditions of political and economic marginalization. For Atzeni and Ness (2018: ix) if we take capitalism within a longer historical and geographical frame, ‘precarious work’ seems to have been more usual than formalized protected work such as that of the Welfare States of Anglo-Western European countries.

After World War II, the USA started to play globally a highly contradictory, confusing and hypocritical role from the point of view of democratization and de-democratization. On the one hand, it was the main nation-state in the world that

promoted the ideals of democracy against what it identified as authoritarianism and totalitarianism. On the other, it became the main global promoter and ally of right-wing and often genocidal dictatorships. Schmitz (2006: 2–3) describes that ‘right-wing dictatorships became part of the free world no matter what the composition of their governments, and the US gained friendly, albeit brutal and corrupt, allies, who backed American policies in the struggle with the Soviet Union.’ Thornhill (2018: 134–202) explains that during the period of decolonization and the Cold War, democracy gradually became a norm by which nation-states were ‘measured and legitimated’. For him the international legal system around human rights and the United Nations system were built within imperial legacies with the main agency and hegemony in its contents and assumptions of the USA and Western Europe. These international systems only accepted a right to national self-determination as territorial sovereignty during the 1960s as the decolonization struggles gained momentum in Africa and through pressure from peripheral countries. Following this point of view, it can be suggested that global democracy and democratization theorizations, diffusion and juridicalization occurred in from the core to the periphery mainly. This trend has continued with some changes in the more contemporary era of convergence of democratic elections and neoliberal economics.

In general, Latin America during the mid-20th century was a region with high levels of illiteracy and economic and ethnic inequality. Before 1980, only five Latin American countries experienced periods of more than 12 continuous years of democratic or semi-democratic rule (Kitschelt et al., 2010: 1). After the return of democracy from the 1980s onwards, authoritarianism, foreign interventionism and the instability of previous decades impeded and sabotaged the formation and institutionalization of representative democratic political party systems, of an inclusive expansive civic society and of popular organizations and restricted the rise of a generally more robust democratic political culture. Additionally, the intersection of class and race social structures in Latin America have been said to have produced a post-colonial ‘pigmentocracy’. In this system ‘white and lighter-skinned Latin Americans are over-represented among the region’s political, economic, and cultural elites. Indigenous and black people are over-represented among the region’s poor and marginalized classes’ (Johnson, 2012: 307).

On the other hand, for Abrahamsen (2000: xiv) the IMF policy interventions in Africa have contributed significantly to political instability, democratic deinstitutionalization and de-legitimization there due to governments often having to choose between external creditors and the economic conditions of their poor domestic majorities to fulfill those accords. Consequently, countries in Africa that became independent nations very recently have had to face the challenges of building state capacity at the beginning of their history as independent nation-states – something central to both economic development and democratic government – within the context since the 1980s of those state-reducing neoliberal and austerity policies. For Merkel (2018a: 11), actors such as the IMF should ‘be seen as a problematic limitation of the sovereign prerogatives of parliament and government’. For the author, any crisis analysis in an age of globalization must examine the extent to which the ‘democratic sovereignty of the national demos’ is constrained by ‘international organizations and powers lacking legitimation’ such as the IMF.

### *A definition of dependent democracy coming from a historic-structuralist point of view*

Dependent democracy is proposed here as the type of democracy particular to the Global South that arises as a result of the national and global unequal systems analyzed in the previous sub-section. Dependent democracy is a democratic system in countries that exist in a subaltern position within the hierarchical, post-imperial and neo-imperial global capitalist and political order. This system features regular elections of governments but these are carried out under the conditions of dependence that their subaltern position within the global order creates. There are three types of dependent democracies according to the place a country is located in relation to the global hierarchy of states going in order from least dependent to most dependent: semi-peripheral democracies, middle peripheral democracies and outer-peripheral democracies.

The proposed concept wants to bring to the fore in the discussion about democracy the realities and historical determinants of global geopolitics and geo-economics in their interaction with national historical and structural realities, aspects that have been missing from mainstream debates about democracy around the world. Thus, the proposal takes an approach that understands democracy, democratization and de-democratization as socio-historical processes made of the interaction between political actors, political institutions and socio-structural systems within the interaction of the national and global levels of the political, economic and ideological-cultural systems.

The main elements from 'classic' Dependency theory that I am working with for the concept of 'dependent democracy' are four. The first of these is going beyond the methodological nationalism of mainstream analysis of democracy by showing the global determinations of democracy and linking these with national politics. A second aspect relates to the center-periphery dyad of structural inequalities of the global order. However, I modified this with an updated form of that which also accounts for the semi-periphery, the middle periphery and the outer periphery. Third, like Dependency theory, the concept of dependent democracy points to a national-global interaction, which articulates dependency that is composed of an alliance of local dominant classes and political elites with global economic and political actors – today these are mainly the IMF and the World Bank, foreign governments with the leadership of the USA, global corporations and NGOs. These are actors often intervening in politics and civil societies of the Global South on their own initiative. A final aspect that I take from Dependency theory relates to the economic arguments of the 1960s–70s around concepts like unequal exchange and uneven and combined development. These have been updated following recent works on imperialism, World Systems theory and Critical International Political Economy, but should be put in dialogue with the political analysis of dependent democracy provided here.

At the same time, I am rejecting, reevaluating and/or expanding on other key ideas from classic Dependency theory. To being with, rather than viewing contemporary politics and democracy from the perspective of the political context in which the theory emerged (1960s–70s), which was one of military dictatorships and armed 'national liberation' struggles, I look to situate my theoretical proposal within the current global context where democracy is the hegemonic discursive and institutional frame of politics

in the world. Second, I criticize the tendency towards lack of engagement of classic Dependency theory with issues of national political systems. This critique was already present in the work of the previously analyzed 1980s Latin American Gramscians and perhaps even by Fernando Cardoso himself when he responded to Gunder Frank in the late 1960s against insurrectionary armed strategies. This view away from armed insurrectionism was already put into political practice by anti-neoliberal and leftist social movements mobilized since the 1980s. This view also was assumed by the anti-neoliberal Latin American wave of left movements and governments of the 2000–10s who decided to completely center their political strategy on winning democratic elections. From that point of view, the Latin American left has proceeded to generally abandon the political strategy of guerrilla insurrection and so the perspective of this article positions itself within that situation.

The proposed concept follows a macro-sociological historic-structuralist perspective (Cyr and Mahoney, 2012) of democracy (Enríquez Arévalo, 2021; Lynch, 2020: 24), loosely influenced by the work of Rueschemeyer et al. (1992: 5–7) and their proposal of three ‘clusters’ of social power in modern societies within their larger analysis of democracy. This approach is taken in order to propose a theoretical frame for structuralist analyses of democracy of any country in the world whether in the core or in one of the peripheries. Additionally, it is proposed that this structuralist type of analysis of democracy be combined with the historical description of the evolution of democracy given in the previous sub-section of the article in order to identify the historical-structural processes that give form to the democratic system of a country.

Here I proceed to apply the proposal of three clusters of social power of Rueschemeyer et al. to the analysis of democracy around the world:

1. Particular classes and class coalitions within a society and the relationships between them – although that view should be extended to more intersectional studies seeing relationships of class related with race/ethnicity and gender as suggested by De Oliveira (2021) in his contemporary intersectional proposal of Dependency theory. The capitalist mode of production, as the hegemonic economic arrangement in the modern era, based on private property and wage labor inside a market, should be seen as a globalized entity, which grew out of what Marx called ‘primitive accumulation’ in both Europe itself and outside of it. Following a class perspective, capitalism is a system that in its national and global expansions produced a class hierarchy centered on the bourgeoisie, which proceeded to dominate economics, politics and culture in the transitions around the world from absolutism or colonialism towards nation-states and later towards democracy in the 20th century. The tendency of previous noble or landowning classes was to assimilate bourgeois economic and social forms towards increasing convergence within the larger bourgeoisie, which rose as a dominant class over the middle classes, the peasants, the urban industrial workers and the urban sub-proletariat outside ‘formal’ capitalist labor. For Rueschemeyer et al. (1992: 52) different paths of economic development lead to different class structures and ‘dependent development’ limits the expansion of the working class that possesses formal employment with rights such as social security insurance in

countries of the Global South, which is a view that converges with the previously mentioned views of Quijano (1974) of economic and political marginalization of the lower classes due to their workplace dispersion because of low levels of industrialization. Trade unions and mass leftist or redistributive parties in the Global South thus tend to have more difficulties to be massive and representative of the lower classes than what exists now in core countries of the North (mainly Anglo and Western European countries), which did experience the 'Fordism' of Welfare State democratic capitalism in the mid-20th century.

2. The state apparatus in its particular capacity in relationship with civil society. States and 'state capacity' have shown themselves to be central for modern democracy (Rueschemeyer et al., 1992: 63–9). For Tilly (2007: 15–16), democracy cannot work if the state lacks the ability to 'supervise democratic decision making and put its results into practice'. State capacity depends on 'the extent to which interventions of state agents in existing non-state resources, activities, and interpersonal connections alter existing distributions of those resources, activities, and interpersonal connections as well as relations among those distributions'. For Tilly, this is especially important in order to control what he calls 'power centers' in society, which can wield significant coercive resources. The implementation of austerity state-reducing neoliberal economic policies since the 1980s tends to sabotage consolidation of state capacity in the Global South. The call of international economic institutions such as the IMF towards reduction of spending and investment for states in the global periphery stop them from building infrastructures for basic health and sanitation as well as others involved in economic activity, which can produce jobs and improve salaries and more general economic growth. Also, it impacts the ability of those states to guarantee basic security and monopoly of force inside a country's territory. These general measures of reduction of state spending and investment fit inside a more general anti-statism of neoliberal economics – coming usually from right-wing sectors linked with the rich – which also undermines intentions and initiatives towards improving basic tax collection by the state and tax progressivity. However, the social imaginary of democracy does not end with the actions of elected representatives in the state and so it has been seen also as existing with wider public debate and social organization in variable forms between poles of individuals and organized group participation and conflict within what has been called 'civil society' (Rueschemeyer et al., 1992: 6). For those authors, 'class power' is linked to the existence of organizations that can represent both higher and lower social sectors against the state, which is what determines the balance of class power and what creates either a dense and expansive or a weak and restricted civil society. On that issue they follow Gramsci in seeing that in the absence of working-class organizations civil society can act as 'a condition for the ideological hegemony of the dominant classes' (Rueschemeyer et al., 1992: 50). Here thus, we can consider the views of the previously mentioned Latin American Gramscians pointing out how an oligarchic state is one that has not experienced a process of national-popular incorporation of the majority. The convergence of the class and national

element can be seen clearly in Dependency theory as the form of post-colonial class relations in ex-colonized countries and those existing as dependent countries. There it is seen how the bourgeoisie and big landowning classes have tended to favor the dependent relationship for their countries and oppose the national-popular projects that wanted a more autonomous relationship with hegemonic and neo-imperial powers as well as a national economic policy, which strives to correct the unequal and combined development of the national economy within post-colonial and dependent capitalism. But here it should be suggested that the lack of national-popular incorporation into the state and politics of the majority is not just an effect of internal social forces but in the periphery also of the post-imperial and capitalist world system due to the convergence of the rich classes and the political elite with foreign states and other actors from the core of that system.

3. The external environment of a state constituted of other states and non-state actors within a region and the whole globe. Here it is important to see the convergence of local rich sectors, a state controlled by a national oligarchic alliance of the rich and a global neo-imperial alliance (which has the hegemony of the USA) that is composed of corporations, states, international economic institutions such as the IMF and the World Bank and NGOs based in the Global North and the corresponding determination of contents and goals from there to be implemented in the countries of the South. Here thus, it can be argued that a dependent country – a country of one of the peripheries of the global system – has a combination of an oligarchic state controlled by an alliance of national rich class sectors with the foreign actors just mentioned here. Dependency theory inherited and developed the mostly geo-economic theoretical dyad of ‘core–periphery’ to insert it in a wider sociological perspective of global geopolitics as seen from the point of view of the Global South. From there it influenced the more historical sociological point of view of World Systems Theory, which updated it by adding the concept of ‘semi-periphery’ in order to note the phenomenon of growing powers in international relations – now mainly the BRICS (Brazil, Russia, India, China and South Africa) countries – which due to their size, population and political and economic influence could be seen as existing in the middle of the global hierarchy between the core and the periphery. Following Ruy Mauro Marini’s (1973) concept of ‘sub-imperialism’, it should be seen that semi-peripheral countries are capable of engaging in hegemonic or dominating behaviors against more peripheral and smaller countries as well as being able to engage in more beneficial South–South cooperation with them.

For Fatton (2016: 120), the logic of core–periphery manifests itself now within a large deepening of global inequality in the neoliberal era. In this context, a lower level of the periphery – that is, the ‘outer periphery’ – is a zone of generalized inequities, extreme poverty and ‘ultra-cheap wages’ where the industrial sector is insignificant and declining, and where politics is merely a ‘simulacrum’ of electoral democracy, which is under the tutelage of a self-appointed ‘international community’. Fatton includes in the outer-periphery Haiti, Somalia, ‘the Congo’, East Timor, South Sudan, Chad, Afghanistan,

Yemen, Central African Republic, Côte d'Ivoire, Liberia, Sierra Leone, Niger, Mali, Burkina Faso, Guinea and Guinea-Bissau. In a similar judgment to one mentioned here before about mainstream democratic theory and the social sciences in Latin America by Franco (1998) and Lynch (2020) on the abandonment of Dependency theory by the Latin American social sciences after the 1980s, Fatton also sees that the complete dismissal by 'conventional' social scientists of Dependency theory occurs now when outer-peripheral countries display patterns of dependence that are significantly more pronounced than what existed in the heyday of the theory. For him, outer-peripheral countries are basically quasi-trusteeships due to their being under the direct tutelage of external military forces for public order while international financial organizations are in charge of economic policies and a wide segment of NGOs financed from North American and European countries are there to 'alleviate' the population from even harsher poverty.

The contemporary middle periphery is thus in a middle situation between the countries that are in the semi-periphery enjoying privileged considerations by that 'international community' due to their size and population and that of the near colonial condition of the outer periphery. We are talking mainly about Latin American, African and Asian countries, which are not seen as part of the semi-periphery or the outer periphery. This means that direct external military presence within these countries mostly occurs in the form of US foreign bases with varying degrees of involvement in their security affairs. Economic policy very rarely includes periods of 'heterodox' policies and mainly tends towards neoliberalism, which often includes democratically elected governments bringing in the IMF to intervene with austerity measures in exchange for loans. In the civil societies of these countries NGOs tend to depend highly on financing from North American and European countries, which also conditions the ideology and focuses of poverty or development aid as well as of 'democracy promotion'. The USA in the 1980s already embarked on a mission to promote its particular view of democracy around the world. Christensen (2017) reports that 'democracy promotion' initiatives target local social movements and other civil society organizations and usually act in close collaboration with the older development and aid organization USAID. Christensen sees that democracy promotion suffered a backlash during the 2000s for assisting 'explicitly pro-western' electoral candidates in post-Soviet Europe around the time of the so-called 'Color Revolutions'. For Bridoux and Kurki (2014), democracy promotion initiatives from both the USA and the European Union tend to assume a restricted liberal and decontextualized model of democracy often linked with neoliberal economic views and in some cases to 'regime change' initiatives.

On the other hand, aid coming from the Global North can have other economic and social consequences. Lorch (2017) notes that critical literature on the relationship between foreign aid and civil societies in the Global South has seen that 'weak states' often lack the capacity to monitor foreign-funded NGOs, which is a condition that can enable a particular kind of globalized clientelism in which hierarchical and unaccountable relationships are established between those foreign agents and local populations. Lorch also reports that other scholars have argued that foreign aid can 'depoliticize local development' and national civil societies in the Global South based on how often it sells itself as technical and 'apolitical' endeavors while often marginalizing other more



politically active civil society actors such as social movements and political parties. And while sometimes foreign aid can enhance the autonomy of some civil society groups against the state and other societal ‘power centers’ this often comes at the cost of increased dependence on foreign donors, which makes civil society groups ‘susceptible to foreign agenda setting’ (Lorch, 2017). For these reasons, it has been argued with the concept of ‘aid dependence’ (Knack, 2001: 310) that this dependence on foreign donors can:

potentially undermine the quality of governance and public sector institutions by weakening accountability, encouraging rent seeking and corruption, fomenting conflict over control of aid funds, siphoning off scarce talent from the state bureaucracy, and alleviating pressures to reform inefficient policies and institutions.

## Conclusion

It was argued here that much of the lack of success of democracy in solving issues of lack of political and economic inclusion and wellbeing in the Global South has been due to the specific nature of democracy in the region, that is, a ‘dependent democracy’. Using key insights from Latin American Dependency theory, but from a point of view of political sociology and international political sociology, this article put forward the concept of dependent democracy, defined as a democratic system of a country that exists in a subaltern position within the hierarchical, post-imperial and neo-imperial global capitalist and political order.

Dependent democracies were described as being of three types according to the place they fit in the contemporary global order. Each of these types implies higher levels of dependency the lower we go: from semi-peripheral and middle-peripheral to outer-peripheral locations in the global system. The main form of socio-structural articulation of a dependent democratic country to the neo-imperial global order is through a tripartite alliance of local rich sectors, an elitist state and a global neo-imperial alliance (which has the hegemony of the USA) composed of corporations, states, multilateral institutions and NGOs based in the Global North who often fund and determine NGOs in the Global South.

Dependent democracies have tended to keep large parts of their populations in the lower class without adequate social and political representation due to expanded economic informality and economic and political marginalization and dispersion linked to lack of industrialization and thus lack of strong social bases for mass trade unions and leftist or redistributive political parties. The article saw as well that the ‘Fordist’ Welfare States of Anglo-Western European countries have also entered into democratic erosion and crisis and so political representation of the lower classes there is also experiencing similar problems to those seen as ‘structural’ conditions of the Global South.

Against Modernization theory and mainstream neoliberal economic and liberal views of democracy, it can be argued here that theory and analysis of democracy has to go beyond a focus on the behavior of national state and party elites (‘methodological nationalism’) in order to understand democracy as a global reality built historically and through social struggle inside the convergence of global and national systems of

capitalist and post-imperial and neo-imperial inequalities. Increasing global and national inequality, rising democratic erosion and the threat of human species' unsustainability due to the global climate crisis forces us to review and reformulate much of mainstream and recent views of democracy in the social sciences, which have been hegemonic during the acceleration of these crises in recent decades.

Nevertheless, there are arguments that suggest that this global political arrangement is in growing crisis itself since the USA is entering a crisis of legitimation and strength while China, Russia and the other countries in the BRICS alliance are increasing in economic and political influence, thus leading towards a more multipolar world. Against this backdrop, it can be argued that the political implication of the argument presented in this article around the concept of dependent democracy is that both democratic national-popular and internationalist struggles by southern peoples and states in the periphery have to be combined with allied struggles in the core/Global North. This alliance would have to seek to end neo-imperial interventionism in the Global South inside that transition towards hopefully building shared global justice and wellbeing for both the Global South and the Global North.

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### **Note**

1. With the word 'plurinational' he is alluding to the recognition in the current constitutions of Ecuador and Bolivia of Indigenous 'nations' inside both of those states in order to correct historic-structural racism and exclusion of Indigenous peoples.

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