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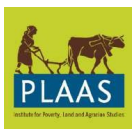


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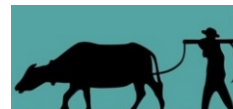
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Daniela Andrade

Abstract

Brazil has recently undergone a shift from economic growth to recession, as well as from a left-wing, neo-developmental politics to one on the far-right, authoritarian and economically ultraliberal. Such an economic and political U-turn touched upon the countryside in contrasting ways, bringing the country to the radar of the Emancipatory Rural Politics Initiative (ERPI) call for research. The ERPI has asked whether and how the 'rural world' is affected by, contributes to or reacts to current authoritarian populism. Although there is a pressing need for scholarship on today's authoritarian politics and emancipatory movement-building in Brazil, the present paper reflects on the politics of the past. It suggests that the road to regression was paved during the tenure of the Worker's Party (PT), when politics were considered both popular and progressive. And it was under the PT's rule when the 'rural world' mattered the most for politics. This paper argues that the expansion of agricultural exports enabled the leadership of Lula as a representative of interests 'from below' while leading a political project that protected and nurtured interests 'from above'. That way, the PT, under Lula's leadership, established an ambiguous, fetishized, and indeed, populist relation with its social base. Two contributions of the present paper can be highlighted. First, it offers an understanding of populism from the class political economy perspective and, with that in mind, it analyses the PT political project, the assessment of which helps to explain the country's regressive turn, as well as to inform emancipatory politics.

Keywords: Brazil, Worker's Party (PT), Lula, populism, agribusiness

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Introduction

The Emancipatory Rural Politics Initiative (ERPI) echoes the growing concern over the rise of populist governments around the world, many of which, associated with authoritarian, right-wing and exclusionary politics. In the ERPI framing article, Scoones et al. (2018) call 'authoritarian populism' their phenomenon of interest and cast the 'rural world' as the site of attention. The rural setting has served as both, as an electoral base for populist leaders or, conversely, as a base for resistance and alternative politics. As the ERPI suggests, the spread of 'authoritarian populism' is not only a reason for concern but also a call for emancipatory rural politics (Ibid.). Grasping a better understanding not only of populism but also of its authoritarian form, the ERPI has asked scholars to provide insights from their country or area of study considering whether and how the rural context is affected by, contributes to or reacts to populism.

This paper looks at Brazil, a country where the economic and political tide has recently changed. In 2016, Brazil fell into a full-blown recession and saw a hostile impeachment process, fuelled by a popular uprising, end not only the mandate of the democratically elected president, Dilma Rousseff, but also the 13-year period (2003-2016) of Workers' Party (*Partido dos Trabalhadores*, PT) rule. After the impeachment, policies shifted towards a stark economic austerity and labour rights suppression. Such an authoritarian and reactionary U-turn was consolidated in October 2018, with the election of the former military and congressman Jair Bolsonaro, who openly espouses fascistic principles, moral conservatism and ultra economic liberalism. His political ascension fed off of fear and hope mobilized by a vicious presidential campaign. All the above suggests that Brazil has joined the club of right-wing authoritarian populism.

Curiously, such a change has touched upon the countryside, and in contrasting ways. It should be noted that 50% of the impeachment votes in the Chamber of Deputies came from representatives of the so-called Agribusiness Parliamentary Front, which comprised 41% of the parliamentarians (Castilho, 2017). The same year of the impeachment, the Agribusiness Parliamentary Front voted to shelve a corruption complaint against the interim president, Michel Temer, saving his mandate. In exchange for congressional votes from this rural caucus, his government committedly fulfilled the sector's demands (Ibid., 2017).

By contrast, the small-scale agricultural sector quickly experienced the bitterness of authoritarianism, austerity, let alone direct violence. In its first week in power, the interim government abolished the Ministry of Agrarian and Social Development and severely reduced or eliminated internationally celebrated programs, such as 'Bolsa Família' or Food Acquisition Program (PAA), that provided support and welfare to the rural poor, among several others setbacks (see Pericas, 2017 and the journal *Okara: Geografia em Debate*, 2018, vol. 12). And perhaps even more alarming was the blatant increase in the average of murders, death threats, murder attempts, torture and imprisonment of rural people since the impeachment (CPT, 2017). Between 2016 and 2017, 132 rural dwellers, including many leaderships, were assassinated, making a 100% increase in the average per year of the 2005-2014 period (Ibid.).

In face of the political backlash and quickly deteriorating economic and social conditions in rural areas, agrarian movements and other organized social forces have been confronted with the pressing need to mobilize the masses to contest the drastic cutbacks in public support, as well as to reclaim the loss of political representation by the government. As part of that endeavour, from August 2017 to March 2018, the Landless Workers Movement (*Movimento*

dos Trabalhadores Sem Terra, MST) openly supported the former President Luiz Inácio Lula da Silva (Lula, for the PT) during a pre-presidential campaign caravan across the country. At the time, Lula was the PT's official candidate and topped all opinion polls.

All of those elements put Brazil at the centre of the ERPI problematic, yet, with a caveat: the risk that scholarship, as well as resistance and mobilization, focus on the recent political changes without sufficient reflection on, and learning from the politics of the past. This becomes imperative given the suspicion that the road to regression did not start with Rousseff's ouster, but has been paved during the tenure of the PT, that is, during the period when politics were considered popular and progressive. And notably, it is in the politics of the PT that populism and the rural context mattered the most. Agricultural production and exports have played a central albeit ambiguous role in the PT's political project, marking its successes and limits, both seen from the perspective of the popular classes – including the small-scale agricultural sector.

Similar to other leftist governments in Latin America, the PT administrations were celebrated for promoting a post-neoliberal politics and a neo-developmental project whose greatest impact was felt on the poor (See Emir Sader, Org., 2013). Agribusiness and the extractive industry exports, both of which seen widespread expansion since the early 2000s, were opportune to sponsor this new type of economic and social progress. As argued here, primary exports were implicitly central in giving rise to, and propelling the phenomenon of 'Lulism' (Singer, 2009), the fetish of Lula's leadership as a representative of the interests 'from below'. Such a political project shipwrecked simultaneously to the exhaustion of the global commodity boom, a fact that was neither misfortune nor mere coincidence, but the outcome of critical political choices of the PT. If at one point, commodity exports were providential to expand state revenue for social and developmental policies, its continuous expansion (up to the present) reveals that such export was endogenous and structural to a state-sponsored pattern of accumulation 'from above' – and as such, antagonistic to the popular appeal of the PT's political project.

Therefore, the expansion of agribusiness for exports encompasses and manifests the ambiguous form by which the PT secured and exerted power, as well as represented the interest of its social base – an ambiguity that is organic and unequivocal of populism. This phenomenon needs to be carefully understood so that its constitutive flaws and practical consequences can be fully exposed and confronted. The first part of the paper presents an understanding of populism in the light of the class-based political economy. That lays the ground for the ensuing analysis of Lulism and the PT's politics, which is done in three stages. The first describes the way politics was perceived and how that reaped political outcomes. The second examines the economic and social bases of politics, contrasting apparent and concrete social effects. In the final part, the paper discusses Lula's model of populism, shedding light on the recent regressive turn, the understanding of which is necessary to inform radical politics of social emancipation.

Approaching populism

[...] if social and political aspirations are not disciplined by careful theory and analysis, they will lead to false prescription and to development policies which fail. Theory is not therefore a mere intellectual indulgence, but, at its best, the most ‘practical’ of activities. (Kitching, 1989: 5)

Since the end of the 1990s and throughout the 2000s, several left-leaning governments in Latin America have surfed the wave of the commodity boom to promote economic growth and social development (Vergara-Camus and Kay, 2017). The so-called ‘Pink Tide’ governments, notably those in Ecuador, Bolivia and Venezuela, have been associated with populism or neo-populism (De la Torre, 2016; Andreucci, 2017), and in a positive fashion. Echoing such an assessment, Scoones et al. (2018: 3) note that neo-populist governments in the region have been in favour of ‘the people’, once achieving ‘impressive gains in poverty reduction and expanded political recognition and government support for previously marginalised groups’ (Ibid.). Their interpretation seems to imply that populism, so long as it is not a right-wing and authoritarian, can be a progressive and most desired type of politics. It is unclear, however, what makes the case for populism itself. Certainly, not all popular and progressive agenda is populist, just as not all populist agenda is progressive. The same applies to authoritarian, right-wing, xenophobic or other types of populist politics.

Drawing from Kitching’s opening quote, defining and analysing populism is not a mere intellectual indulgence, but a practical activity with important political consequences. This becomes even more critical considering that populism itself is a political phenomenon. That should bear consequences on how it is understood and theorized. Populism is ingrained in relations of representation, which, in the context of the ERPI, encompass the relations between the state (representative) and citizens (represented). Not surprisingly, populism grows in the cracks of representative democracy – the formal method of governing of most capitalist economies, including Brazil. Populism emerges from, and unfolds into economic and social phenomena that are conditioned by, but also mutually organize the politics of the state. Essential questions such as who decides what, who does and gets what must be addressed theoretically.

Although this paper is not the space for an extensive theoretical exploration, key conceptual aspect of populism should be noted, so that real experiences can be singled out and direct consequences, exposed. Despite being at the forefront of extractivism and developmentalism in the latest period, the government in Brazil has seldom and perhaps more contentiously been associated with this phenomenon. So, what is populism, and why would the PT government, under the leadership of Lula, make a case for it? This paper examines the question in light of the political economy, beginning by looking at what democratic representation entails in a capitalist economy.

Democratic representation as a system of power

Representative democracy is a system of governing based on the principle that people decide on matters of the public interest through state representatives chosen out of a selection of candidates. To citizens, however, it is reserved the power to elect (or reject) a government by means of voting. Their choices rely on the set of ideas, propositions and policies that are presented to, and not exactly formulated by them – and which they will not directly

command. That is not only a limited way to express preferences and demands, but also a limited scope for participating in decision-making. Who effectively have the capacity to express views on the public matter and decide how to carry out ‘the will of the people’ are the state representatives.

Political representation, therefore, entails that between those with concrete needs, interests and demands and those who voice and realise them on their behalf exist a difference in agency and decision-making capacities, which contains an inevitable disposition of power. That becomes critical considering that the ‘common good’ ‘is bound to mean different and irreconcilable things to individuals and groups (Schumpeter, 2003: 251), regardless of their capacity to make informed, rational and accurate choices about what is best for them. In capitalist societies, the state decision-making reflects and impinges on the disposition of power existing in society, that is, in the structure of social relations (Wood, 1995: 20).

Social and power divisions naturally arise from the organization of material reproduction (production, exchange, appropriation and consumption). In capitalist societies, however, the social organization of material reproduction is structured around property (who owns what and what they do with it) and the social position in the market (who does and gets what).¹ Individuals or groups of individuals have interests that derive directly from their position in that specific social form of organization and reproduction (Fine & Saad-Filho, 2016: 10 and 21). Hence, it is important to be aware that, when the state intervenes in the development process, it inevitably puts in confrontation different social interests. While some are represented, protected and nurtured, others are remediated, neglected or undermined. That also implies that, in a capitalist society, the control over the state and the power to govern becomes a battle conditioned by, and reflecting the social disputes over the (re)organization of property, production, appropriation and accumulation. That is why Wood says that the state represents the ultimate locus of social force; it is ‘the decisive point of concentration for all power in society’ (Wood, 1995: 47).

Representative democracy, despite ensuring the right to vote to all citizens regardless of socio-economic position, has been opportune to maintain the capitalist social order, which presupposes the monopoly of means of production (by a minority), and wage employment (of the majority) (Wood, 1995). That is because exerting ‘civic freedom and equality’ (Ibid.: 201) does not directly affect the logic (and legitimacy) of private property, market compulsion and the imperative of profit maximization – the capitalist spheres of domination and coercion (Ibid.: 234). Even though democracy, in its original and historical meaning denotes ‘rule by the *demos*, “the people”’, representative democracy became (tacitly) the rule by the dominant classes (Ibid.: 225).

For the purpose of this paper, it matters to note that economic and social justice can hardly be achieved by means of voting – much less, social emancipation. Wood (1995: 216) has judiciously argued that representative democracy circumvents the power of the people and alienates them from power. As discussed below, populism exacerbates the flaws of representative democracy, while further concealing them. As a corollary, democracy as a whole is perceived as more transparent, direct, legitimate and just, while becoming more

¹ In capitalist societies, material reproduction is ‘organized and attached to the market’ (Fine and Saad-Filho, 2016: 18), and follow the profit imperative (or, the logic of capital accumulation). That presupposes the monopoly of means of production (by a minority), and wage employment (of the majority) – the basis for generating the compulsion to sell labour power and to use it in commodity production for profit (Ibid.: 10 and 21).

² From 1989 onwards, the control and coercion of the working class becomes ‘primarily “economic” rather than “political”, as was the case under the dictatorship’ (Saad-Filho, 2010: 24). Democracy was established as ‘the

arbitrary, personalistic and pernicious. Not surprisingly, populist leaders produce deep loyalties and cleavages, polarizing ‘their politics and the academic community into those who regarded them as democratic innovators, and those who considered them a threat to democracy’ (De La Torre, 2017: 1). In different degrees, populism tends to be politically and economically transformative, but socially conservative, reproducing rather than transcending social hierarchies and inequalities.

The fetish and the political economy of populism

What is distinctive when populism is embedded in relations of representation – and what is peculiar to the manifestation of populism itself – is the existence of a *fetish*: a fetish of democratic and direct representation of the popular will at the political stage, the fetish of the ‘common good’ realization (no matter how arbitrary the ‘common good’ might be) or even the fetish of a popular hegemony. The fetish makes democratic representation transcend its concrete attributes, becoming all the more ambiguous about who controls politics, who express their will, whose political project, whose agency, whose power, who benefits and who loses.

As the term ‘populism’ indicates, the ambiguity in populist politics is defined in relation to, and from the perspective of ‘the people’, which are both, agent of state political empowerment and recipient of the state political decision-making. In capitalist societies, no representative of the state is elected without the voting of the working class (the social majority). ‘The people’ will always encompass fractions of the working class, forming a more or less heterogeneous group.

For Weyland (2001), populism is a strategy to attain, expand and exert the power to govern based on the effect of a political leader over the masses. Economic and social policies can be used as instruments for this purpose (Ibid.:11-12). The idea of a strategy of power is problematic in at least two aspects. First, it falsely suggests that it is available and can be applied by anyone, any time and context. Second, it centres the phenomenon on the ‘leader’ who rises to power and seizes the control of the state. Although that is part of the phenomenon, populism is a relation with the people; it describes the politics empowered by and, most importantly, effected over them, the masses or the broad working class. That is where the political analysis of populism should focus on.

A populist representative is indeed a leader (usually male) who concentrates agency and power. He has a greater political appeal to the public (a matter of degree) but an appeal of a different quality, such as personal charisma or background, cultural or partisan identity, rhetoric or discourse. A political representative becomes a ‘saviour’, a ‘father’, a ‘hero’, ‘one of us’, establishing in the exercise of power a direct, unmediated, uninstitutionalised, quasi-personal relation with their constituencies (Weyland, 2001:14). A leader elicits the fetish, embodying the collective identity or the collective will (Arditi, 2005: 81-83). As such, he aggregates the ‘the people’, giving them a symbolic collective identity that was not articulated before and which will come to express a common and superior interest, aspiration or an ideological unison (Ibid.). By default, ‘the people’ are defined against a frontier, ‘a no common identity’ (Mouffe, 2005: 57) – ‘the elite’, ‘the other’, ‘them’ – explaining why social polarization comes together with populism.

Laclau (1977: 165) observed that populism was widely characterised by its superior appeal to the people – above class and other social divisions. That could also create a positive and much-needed unity to overtake power and put an alternative political project in place. This aspect has allowed different formulations on populism to foresee one version of it that is positive and most desirable. In Laclau’s early formulation, for example, this would be the case of ‘populism of the dominated’; that is, when they (the dominated) win the masses ideologically, imposing themselves hegemonically against the dominant (Ibid.: 173; 194-95). As already said, the weight of the masses is certainly crucial in the political dispute over, seizure and control of the state. But the idea of ‘people’s power’ can easily become an unproblematic treatment to transformative politics – an important aspect of populism itself.

First, one should be sceptic about the pursuit of emancipation through political representation, instead of direct collective action. Yet, populism prompts that people stay accommodated, loyal to and reliant on the leader, who they entrust to act on their behalf. Their protagonism is stalled and citizenship, disempowered. Moreover, material achievements articulated by a leader will corroborate to form a ‘grateful and obedient mass’ (Lefort, 1992 *in* Ardit, 2005: 96-97), instead of a critical and politically engaged. Second, one should not assume the immediate interest of ‘the people’ (or the dominated) in resisting capitalist exploitation, and should be suspicious about transformative politics arising from arbitrary popular unity, subjectively construed. They are likely to conceal crucial socio-economic differences, as well as essential sources of capitalist exploitation, differentiation and inequality (Wood, 1995: 101-103).

If populism entails the formation of a counter-hegemonic bloc that seizes the control of the state by bringing people’s voice and aspirations to the political stage, how the formation of this new social pattern of political and ideological force corresponds to (new) patterns of property organization, production, distribution and appropriation, from the perspective of the masses? That is the heart of the matter.

In brief, grasping the populist fetish requires two levels of analysis. One regards the description of how a leader, the masses and the political agenda are perceived (as ‘the people’ against the elite, for example), and how their relationships, actions and political capacities are shaped as a result. Most descriptions and analyses of populism do just that, which is not unimportant; populism is about perceptions driving political outcomes and playing a key role in the battle for power. Yet, a judicious investigation should make a second analytical step to disclose the relationship between the way reality is perceived and the way it is in essence – a task to which the Marxist political economy is devoted (see Fine and Saad-Filho, 2016: 4). The analysis should reveal how subjective political relationships – such as those among ‘the people’ and between them and the state – correspond, objectively, to their interest. *Class* is an objective basis for this analysis.

2003 to 2007: prelude to a leader of the poor

Brazil, a country for all
(2002 electoral campaign slogan)

Lula contested three presidential elections as a candidate for the Workers’ Party before he was successful in 2002. From his first campaign in 1989 to his first mandate, Brazil went through two mutually reinforcing and mutually constituting transitions (Saad-Filho, 2010: 24), which require consideration. The first was the political transition to democracy, which started in

1984 after twenty years of military dictatorship. The second was the economic transition to neoliberalism in the early 1990s, underpinned by policy and institutional reforms.

The combination of high interest rates, overvalued currency, fiscal austerity, privatization of public assets, open trade and capital borders – the cornerstones of the reforms – entailed a fast-advancing process of financialisation that transformed the patterns of production, capital accumulation and labour reproduction in the country. The national industry, which had significantly developed under the previous (developmentalist) period, was particularly harmed, and with it, the industrial workforce. More than two million salaried posts were lost between 1989 and 1999 only in the industrial sector (Oliveira, 2006: 11). According to Saad-Filho (2010), democracy corroborated to, and legitimized economic changes that have, on the one hand, fragmented workers, repressed trade union activities, increased economic insecurity and, on the other, created the conditions for capital accumulation through the expansion and intensification of financial transactions and transfers of income (and power) to the financial system.²

The reforms produced five initial years of macroeconomic stability and consumption-led growth (1993-1997), which were followed by five years of multiple crises and recession (1998-2002) – balance of payments crisis, currency collapse, return of inflation, job cuts, wage stagnation, relaxation of labour rights, deterioration of public services and so on. The Workers' Party and Lula's leadership historically began representing the corporatist struggles of the organized working class and challenging neoliberalism and the ruling order.³ Lula's first electoral triumph partly reflected the Party's political mobilization but also reflected the general dissatisfaction with Cardoso's government, largely blamed for the crises.

Lula was elected with 61,3% of the votes (and 46,5% in the first round), coming from the social segments most affected by neoliberal financialization – or, as called Saad-Filho and Morais (2018: 109-113), from an 'alliance of losers'. They were the unionized working class (rural and urban), civil servants, sections of the middle class and business community (Ibid.). They were also predominantly educated, with superior income and from the most urbanized and industrialized states (Hunter and Power *in* Singer, 2009: 90).

His election was celebrated as the long-awaited 'rise of the left'. The fight against hunger and misery was at the centre of his political programme. Yet, the Party had shown throughout the electoral campaign that it no longer had the same political and ideological fibre of the past. The PT had tempered its discourse and adopted an all-embracing campaign slogan (seen in section opening quote) that stamped a spirit of non-confrontation to the Party – just as did Lula's self-declaration as the candidate 'peace and love'. The Party also allied with a centre-right party from which an industrial businessman (yet, coming from a poor background as Lula) was chosen as vice-president. During the final stage of the campaign, Lula addressed the Brazilian people in a letter in which he committed, if elected, to maintain orthodox macroeconomic policies of his predecessor. That was a move seen as both, pragmatic and politically opportunistic, as explained ahead.

Preceding the election, the Brazilian economy was on the verge of collapse because of a

² From 1989 onwards, the control and coercion of the working class becomes 'primarily "economic" rather than "political", as was the case under the dictatorship' (Saad-Filho, 2010: 24). Democracy was established as 'the political form of neoliberalism in Brazil' (Ibid.).

³ Together with the Workers' Central Union (CUT), the PT has fought against 'privatizations, outsourcing, the managerial state model, at the same time they have defended the universalization of public social policies and the state responsibility for meeting social needs' (Sitcovsky, 2013: 119, author's translation).

massive capital fly and domestic currency devaluation. The letter intended to appease the nerves of foreign investors and the market in general, alarmed with the possibility of Lula's imminent election. It also intended to gain the sympathy of more conservative constituents who had never voted for the PT. As noted Anderson (2011), Lula had understood that 'it was not just builders and bankers who needed reassurance that he would not do anything unduly radical in power, but – even more crucially – street vendors and slum-dwellers too'.

In brief, Lula's campaign had an ambiguous political identity. Despite casting a breath of hope for improvements and political renovation, it also cast a sense of political disenchantment and scepticism within the radical left and the PT's most traditional and politicised base. It was clear the PT had no mandate to carry on the structural changes that once formed the Party's political platform (Saad-Filho and Moraes, 2018: 116-117).

In January 2003, Lula assumed the presidency, receiving the country in disarray. Unexpectedly, though, by the end of his first year in office, he had stabilised the economy and from there, he continued making extraordinary achievements throughout his mandate. The country seemed ready to 'take off' by 2006 – the Brazilian miracle coming through! It is crucial to understand the basis for, and the reach of his economic and social achievements. First, however, we look at the appeal they have effected – perhaps Lula's most important political feat.

2007-2011: A fetish emerges 'from below'

Lula again, with the power of the people
(2006 electoral campaign slogan)

In 2006, Lula was re-elected with 61% of votes in the second-round run-off (and 48.6% in the first), thus, practically the same percentage of votes as before. Yet, the overall electoral result concealed a phenomenon that the Brazilian intellectual, André Singer, noted and called 'Lulism': the rise of Lula's leadership of the masses. The total voting masked the fact Lula was rejected by his previous electorate.⁴ Yet, a new constituency, with very different social features, compensated for the loss of votes, reappointing him as president. His new social base included the internal bourgeoisie, but most of all, the low and very low-income strata, beneficiaries of social policies of his first mandate. This time, his supporters conformed an 'alliance of winners' (Saad-Filho and Moraes, 2018: 126). The gross of Lula's voters encompassed a social category that Singer (2009) called the 'sub-proletariat'.⁵ They represented the majority of the Brazilian workforce since the neoliberal restructuring (Oliveira, 2006: 11): mainly informal workers, precarious and poorly remunerated – the working poor. They were also from rural areas and overwhelmingly from the North and Northeast of the country.

As Singer (2009) remarked, for the first time in Brazilian history, the very poor voted for Lula, a candidate of the left. His explanation is important to the argument of this paper. For

⁴ Singer adopts the definition of his father, Paul Singer. In brief, the sub-proletariat is a social category that sells its labour force below the necessary for social reproduction.

⁵ The loss of the previous electorate is partially explained by the scandal of corruption, the so-called 'mensalão', which erupted in 2005. Oliveira (2006: 5) also reminds that, although voting is compulsory in Brazil, 31% of the electorate either did not vote or cast blank or null, the highest electoral indifference in Brazilian democratic history.

him, the change in the pattern of voting of the sub-proletariat has to do with two characteristics of that social stratum, both of which were matched by Lula's inaugural legacy. First, given their sheer poverty, this social group had an objective and pressing need for material and social change, along with a strong desire for change. Second and paradoxically, the sub-proletariat, even though desiring change, had a conservative political and moral ethos. Differently from the formal working class, these workers had no protection from syndicates or from its own forms of labour organization, and had little capacity to build it from below (Singer, 2009: 87-88). That way, they were the most affected by strikes or social unrest, for example. As a result, this material and socially vulnerable group expected changes, on the one hand, but without confrontation and social distress, on the other. Furthermore, given their lack of social and political organization, they relied on the state to promote change and protection. In the 2006 election, they were aggregated under the expectation that Lula was the leader of such a state, tackling inequality without breaking with the established order – indeed, a sound assumption.

As already mentioned, the PT had adopted a strategy of non-confrontation in the 2002 campaign, renouncing its radical leftist identity, moderating its discourse and political program. Economic stability, which is particularly important to the informal, non-unionized workers, was also achieved. But different from all previous socially conservative governments, Lula was able to substantively improve the quality of life of the very poor, increasing its purchase power, in particular. Such achievement resulted from the cash transfer program, the Bolsa Família,⁶ but also from the 24,25% real increase in the minimum wage during his first mandate (Hunter and Power in Singer, 2009: 92). That had a particular impact on the income of families exclusively relying on the pension of an elderly member. Lula's social policies also included popular credits, support to family farmers, popular housing, energy to remote areas and so on. All together, they allowed an increase in popular consumption, an expansion of the domestic market and the creation of more jobs (Anderson, 2011). His welfare policies were material evidence (thus, a powerful belief foundation) of his intention and ability to put in place a transformative agenda for the poor.⁷

Singer's thesis argues that Lula established an ideological bridge with the poor with a conservative vision by succeeding to assist them only by pursuing weak reformism. Lula was identified by the masses as a leader at the forefront of a political and ideological programme for them – giving rise to the phenomenon of 'Lulism' (Singer, 2009). Singer suggests that, unable to mobilize and shape the sub-proletariat through a Left debate and action, Lula transformed the sub-proletariat into a political actor doing the opposite; that is, shaping its own discourse and political stance to their conservatism (Ibid.: 99).

Singer's thesis is sophisticated and nuanced, but here it is not presented, neither endorsed in its entirety. It has also provoked considerable academic repercussion in Brazil, which this paper reflects only partially. What we take here is the phenomenon of the electoral realignment and the inception of Lula's leadership over the masses. Both of which, Singer pointed out and offered convincing historical and contextual explanations, also based on the formation of the Brazilian working poor in its social, political and psychological constitution.

⁶ 'Between 2003 and 2006, the Bolsa Família programme had its budget multiplied 13 fold, jumping from R\$570 million Reais to 7,5 billion Reais, assisting about 11.4 million families near the 2006 election' (Singer, 2009: 91, author's translation).

⁷ 'By some estimates, the number of the poor dropped from around 50 to 30 million in the space of six years, and the number of the destitute by 50 per cent. Half of this dramatic transformation can be attributed to growth, half to social programmes – financed by higher revenues accruing from growth.' (Anderson, 2011).

Admitting that, some remarks can be made.

De la Torres says that ‘Left-wing populists emerged [in Latin America] as a result of widespread popular resistance to neoliberalism’ (2016: 63-64). While it holds true that the PT came to power as a result of discontentment with the effects of neoliberal reforms, Lula’s leadership as the president who could voice and act on behalf of the marginal masses emerged despite, if not because of his compliance with the (neoliberal) order. One of the hallmarks of populism, as discussed in the literature, is indeed the discursive and ideological antagonism with the established order. According to Laclau ‘there is no populism without discursive construction of an enemy’ (Laclau, 2005b: 39 *in* Andreucci, 2017: 4). Lula, however, aggregated its social base with a discourse of social conciliation. That would not invalidate the hypothesis of populism but point to limits of empiricism in the literature. If Singer is right, social conciliation allowed the expression of an ideological unity with the working poor – just as a discourse of antagonism would do in a different context. It is noticeable, though, that in a deeply divided and unjust society such as the Brazilian, social conciliation is a rather detached construction from reality – indeed, a fetishized proposition.

Furthermore, contrary to organized resistance, it is precisely the disorganization and depoliticization of the working class – both deepened by neoliberalism – one of the pillars of Lulism. In the words of Filgueiras (2013: 15), Lulism did not originate only in the poverty-reducing policies, but reflected, more importantly, the identification of Lula as the representative of those fragmented and disorganized social segment, that could not express itself in the political arena in an autonomous and independent way. Paradoxically, the rise of Lula (and the PT politics) manifested the dilapidation and disorganization of Lula’s own class (Oliveira, 2006: 11). It is important to make a parenthesis here to reinforce that Lula (and the PT) had an organized and critical electoral base, though insignificant in number. Agrarian movements such as the MST were part of it.

Reaching to the poor through Federal Programs, Lula popularized the state and delivered a symbolic message, which he incorporated for himself: ‘the state [or Lula] cares for the lot of every Brazilian, no matter how wretched or downtrodden, as citizens with social rights in their country’ (Anderson, 2011). As Anderson stresses, the image of a caretaker of the poor became Lula’s ‘most unshakeable political asset’ (Ibid.). Without lessening the importance of the material difference he promoted in the lives of the simple people, I draw attention to a change that is not material, although no less concrete: the advent of Lulism, the fetish of Lula’s leadership of the poor, and the formation of a direct relation between him and his supporters. Lula came to embody the popular aspirations, not only gaining the status of ‘our president’ but giving a sense that the working poor had become the main social force in power.

Lula had the same social background of his supporters and incorporated the culture and the language of the poor. Although in the past that was not an asset for him, after his first successful term in office, his personal history as an authentic working poor that migrated out of the Northeast and reached to the presidency began to have an impact on the self-esteem of the popular classes. That has expanded the legitimacy and credibility of his government, as the champion of the poor. Bolsa Família, despite being managed impersonally – and thus contrary to the kind of clientelism of classic populism (Anderson, 2011) – had a greater political effect for Lula (and the PT) than an effect on poverty. Other social programs, resents Oliveira (2006: 19), were so poorly managed that they achieved virtually nothing more than reaffirming Lula’s leadership and caring image.

Anderson (2011) remarks that Lula's direct relationship with the masses cut off the media's role in shaping the political scene in the country, as it had happened in the election of Collor, 'the hunter of "Maharajas"' (1989), and FHC (1994 and 1998), the 'tamer of inflation'. The 2006 election showed an effective loss of political power of the media, while the masses assumed indeed a protagonist role by effecting political power through its connection with Lula, not only giving him a second mandate but the two subsequent ones to the Workers' Party.

Lula realised early that 'social conciliation' only served to aggregate the masses; he could not win the trust of the elite, even if he tried to. Oliveira reminds that, in his first interview after his second election, he 'complained bitterly of not being the choice of the rich, pointing out that bankers have never earned so much money as under his government' (Oliveira, 2006: 6). He was right but chose to reinforce the idea that his election was a victory of the poor. The media picked up on that and fuelled a polarization between rich and poor. Of course, the dichotomy was false. First, not only of the rich was formed the other half of the electorate, observes Oliveira (2007). Second, as Lula's statement denounces, his administration was not only, and not even mainly, supporting the poor; it was too a victory of the rich.⁸

The division between rich and poor has connections with class conflict, but it is not the same as class struggle, said Singer in an interview (Singer, 2013). That type of polarization had characterized the populist period in Brazil, before democratization. After that, the PT itself had re-structured the political party system around left and right politics, and as such, expressing class struggle in a way not seen before. As he summarizes, the success of Lulism involved a solution to political mobilization from above, creating both a depolarization [between capital and labour] and a repolarization of politics [between rich and poor]' (Singer, 2012: 157 in Filgueiras, 2013: 15).

Lulism, fetish and populism

Although Singer would agree that Lulism incorporates several elements of populism, for him, the political project of the PT was genuinely a project of the sub-proletariat with a conservative ethos, that is, an authentic populism 'from below', representative of the poor. In Singer's view, Lula's economic orthodoxy, which we will discuss ahead, was not simply a concession to capital, but it responded to the needs of the poor (Anderson, 2011).

However, to infer that the PT carried out the political project of the sub-proletariat, it is necessary to look at the state's overall politics to locate where and how the politics of the poor was anchored in the broader political context and how that made sense to the poor. In dialogue with the preceding discussion on populism, it is necessary to know how the rise of a new pattern of a political and ideological project (that put the popular aspirations at the political stage) translated into a (new) pattern of property organization, production, distribution and appropriation. Fetishized politics is precisely the detachment of one pattern from the other. That also implies that a fetish can only be fully characterized in reference to the material and social relations. Did the PT represent the interest of the working poor or that representation was fetishized?

⁸ 'Outlays on the Bolsa Família totalled a mere 0.5 per cent of GDP. Rentier incomes from the public debt took a massive 6-7 per cent.' (Anderson, 2011).

Next sections look at the political project of the PT from an economic perspective, considering how the policies aimed at the interests of the poor were articulated economically and politically. It is in this context that the expansion of agricultural exports gains a prominent and revealing political role.

Disclosing the economic basis of the PT's political project

The combat of poverty and social inequality without confrontation – the basis of Lula's ideological and social project – meant, in practice, having an economic project with two legs: one developmentalist, the other, neoliberal. The latter was a continuation of Cardoso's prescription; the former represented the novelty of the PT's strategy. Organic intellectuals of the Party (see Pochmann; Sader *in* Emir Sader, Org., 2013) have called the political project 'neo-developmental' and defended (boldly) the advancement of a post-neoliberal pattern of development in the country – despite the maintenance of the neoliberal macroeconomic orthodoxy. In the critical view of Arruda Sampaio, the neo-developmental project of the PT intended to

‘reconcile the “positive” aspects of neoliberalism – unconditional commitment to currency stability, fiscal austerity, the search for international competitiveness, the absence of any kind of discrimination against international capital – with the “positive” aspects of the old developmentalism – commitment to economic growth, industrialization, the regulatory role of the state and social sensitivity’ (2012: 679 my translation).

However, if the combat of social inequality within the established order were two political agendas that did not seem to combine (Singer, 2009: 96), developmentalism and neoliberalism were two policy prescriptions whose mix appeared unsustainable, either from the mainstream perspective or the new-developmental heterodoxy (Morais and Saad-Filho, 2011: 523). On the one hand, neoliberal macroeconomic policies impose real limits on growth, on industrial competitiveness, public investment, social welfare and state activism, all of which promoted and expected by the developmental policies. On the other hand, the expansion of domestic consumption, imports and public spending which they promote deteriorate the current account balance, the primary fiscal surplus and inflation control, undermining the macroeconomic stability aimed by the orthodoxy.

At the political sphere, developmentalism and neoliberalism were also marked by a tension between a productivist and a rentier coalition. As Filgueiras (2013: 15) explains, the productivist political agenda included the control of foreign capital flow, interest rate reduction, devaluation of the domestic currency, protection of the industry against the 'Dutch disease' and deindustrialization, more public investments in infrastructure and reduction of inequality. The rentier coalition, in turn, advocates high interest rates, free flow of foreign capital, floating exchange rate, central bank independence and rejection of state-led redistribution. As says the author, Lulism balanced itself between the interests of the two bourgeoisies with the support of the sub-proletariat (Ibid.).

Despite the tensioned economic and political arrangement, it is well known that between 2005 and 2011, Brazil experienced an economic upswing, followed by undeniable social changes, even if incipient. Lula ended his administration in December 2010 with an unprecedented level of popularity (around 90%). How did he reconcile the irreconcilable?

There was no leadership miracle but a few explanations. Contingent and exogenous causes to

the national economy partly explain the temporary lift of the policy incompatibility within the PT's political formula (Morais and Saad-Filho, 2011: 523). That has enabled achievements to the working poor but on an unreliable, unsustainable and ultimately flawed basis.

Agribusiness and the commodity boom: a political windfall

In his first year in power, Lula reaped the political fruits of a sizable soya harvest, traded in the international market, not only at an exceptional price but also under the condition of a strong devaluation of the domestic currency (which generates an extra revenue). It is unquestionable in this period of the early 2000s the specific role of agricultural exports – and not of primary commodities more generally – in lifting the economy out of crisis and reverting the state of stagnation that had led to the defeat of Cardoso's Party in 2002. For that, two elements were fundamental: first, the increase in agricultural productivity, reflecting the technological advancement in the export sector promoted by Cardoso's last administration. Second, the trade surpluses of the agribusiness sector reflected the beginning of the global commodity price and demand boom driven by emerging markets, particularly China. In brief, when Lula first took power, Brazil was in crisis but ready to feed into and benefit from the global commodity supercycle. Already at the end of 2003, the agribusiness trade surplus had offset the country's current account deficit, ending the macroeconomic instability and producing the first cycle of growth that had an enormous political effect for Lula and the PT.

From 2003 to 2004, the GDP growth (annual %) went from 1.1 to 5.8, and by the end of 2005, Brazil was clearly experiencing a growth cycle mainly driven by exports, and agricultural exports in specific. According to Loureiro (Forthcoming), between 2003 and 2005, exports corresponded to 43.5% of aggregate demand and 1.5 of total GDP growth rate, against 1.3 and 0.1 of private consumption and investments (Ibid., table 1).

This externally driven cycle of growth unleashed a series of processes that led to a second and virtuous cycle, with very different characteristics (Ibid.). Together with macroeconomic stabilization and lower inflation, the first growth wave helped to recover the average real salary of the economy after mid-2004 (Filgueiras, 2013: 23), stimulating an increase in domestic consumption. The extraordinary trade balance surpluses mentioned above stimulated the return of foreign investors to the economy, and with foreign investments, production, trade and consumption on the rise, the fiscal budget increased, allowing the expansion of income distribution programs and public investments, both having an impact on jobs. The improvement in employment and income – through income transfer programs, the minimum-wage increase and access to popular credit – further stimulated consumption. From 2006 to 2012, economic growth was domestically driven and mainly by domestic consumption and investments (Loureiro, forthcoming). It was not, however, detached from the commodity export sectors.

Launched in 2006, the Growth Acceleration Program (PAC) was a state investment platform, which became a dynamic centre of growth in the subsequent years (Sitcovsky, 2013: 120). The focus of much of the PAC investments was induced by the production of commodities for exports. The massive inflow of foreign investments of this period also responded to the opportunities in agriculture, commodity production and related infrastructure. That has enabled the evolution of employment to take place at the base of the Brazilian social pyramid, in a manner consubstantiated by the expansion of economic sectors, such as agribusiness, extractive activities, construction and commerce (Pochmann, 2012 in Paraizo, 2017: 45).

Most important, however, was the role of agricultural exports – now together with the extractive industry (oil, mining and gas) – in alleviating the tensions between the developmentalist policies and the neoliberal macroeconomic framework. The primary sector exports have allowed, even if temporarily, the expansion of growth, leveraged by investments and consumption, without having to lower interest rates or control currency overvaluation, and, says Filgueiras (2013: 37), without having the consequences of undermining the balance of payments (BoP).

If on the one hand, the steady appreciation of the domestic currency – resulting from the massive inflow of foreign currency brought by commodity exports and foreign investments – further reduced the competitiveness of the national industry in the domestic or foreign markets, it improved, on the other, the capacity to import industrialised goods. The increase in domestic consumption could be sustained by a direct increase of cheap imports, particularly of medium to high technology production inputs (reflecting the gap in the profile of the Brazilian industry deepening since the 1990s' reforms) (Carneiro, 2010). Meeting the growing domestic demand in the mid-2000s, implied creating a growing industrial trade deficit, which was counterbalanced the by primary commodity exports. The latter continued to expand regardless of the exchange rate given its competitive advantage. That dynamic, though, contributed to the deterioration of the commodities - manufacture composition of the trade balance (Morais and Saad-Filho, 2011: 523), advancing a regressive trend of primary specialization in the international division of labour (Filgueiras, 2013: 45).

The expansion of domestic consumption was also associated with inflation pressure, which gave an apparent justification for the government position in maintaining extremely high interest rate throughout the period. High interest rate, however, transformed the country into a major hub of foreign investments, precisely attracted by its large domestic market, the commodity production and extraction (Gonçalves, 2011: 6), as well as by the interest rate differential and the speculative rewards it represented. But high interest rates depressed domestic investments, fostered currency overvaluation, deindustrialization and greater denationalization of the Brazilian economy. The escalation of foreign investment, particularly of the speculative kind, also implied an intensification of income and profits repatriation, or a draining of income and capital from the country. That has added pressure on the current account, just as did the rise of the industrial imports

That meant, in brief, further reliance on the primary commodity exports, important to offset the industrial trade deficit and remunerate the stocks of foreign capital; both perversely enhanced as a consequence of the growth model (Andrade, 2016). That way, it became feasible to operationalize the macroeconomic tripod (Filgueira, 2013: 37) in combination with growth and the social tripod (income transfer, minimum wage and popular credit), without having an immediate constraint caused by BoP deficit. Such economic and political role of primary exports became evident during Lula's government. He accommodated and reconciled potentially conflicting interests among the productive and rentier bourgeoisie and the working poor (Filgueiras et al., 2010, p.39), but, as previously noted, it was the latter who handed him his most important political reward.

Several authors understood that, in the second cycle of growth, there was a relaxation of the macroeconomic tripod, followed by a stronger protagonism of the state through developmental and social policies. That was called a policy inflection (Barbosa and Souza, 2010), boosted as of 2006 by direct state support: massive public credit to large-scale agriculture, induced private investment, loans from the National Development Bank (BNDES), the South-South investments and partnerships, and so on. However, the persistence

of the orthodox monetary and exchange rate policy (within the framework of an inflation targeting regime) throughout the PT's administrations, only proves the ascendance of finance – or of the rentier coalition – in policy-making, having secured high rates of return on financial investments at the expense of the escalation of the public debt, external liabilities and their related social cost (Andrade, 2016).

What seems to happen in this period is the continuation of the financial capital hegemony,⁹ but in communion with the expansion of specific productive sectors: those that, even under contractionary macroeconomic conditions, were still highly competitive exploiting cheap and abundant production factors. The domestic productive coalition that was strengthened in this period was very much attached to land and natural resources. The developmental policy inflection depended on and nurtured itself from the primary sector – which, at least in the case of agribusiness, is also organically financialised and very much denationalised sector, thus reproducing internally the dominant pattern of accumulation.

Vergara-Camus and Kay (2017) pointed to the inability of left-leaning governments in Latin America to confront the power of agribusiness and deal with the rentier character of the state. In the case of Brazil at least, what we see is not an inability to confront; it was direct reliance on agribusiness and the extractive industry, which became endogenous to the dominant financial pattern accumulation that the Party sponsored. Differently from the first years of the 2000s, agribusiness exports were no longer only a contingent element that helped to launch the neo-developmental experience of the PT and leverage a progressive social facet of the Party's politics. Agribusiness for exports became integral to regressive structures of production, trade, consumption and finance that sustained the rentier hegemony. Next section discusses how these structures prevent and antagonize with economic democracy, and thus, the long-term interest of the working class – an important inconsistency in the politics of the 'sub-proletariat'.

The fetish of popular representation

The subordination of the development policy to monetary policy during the PT administration consolidated and advanced the 1990s restructuring of production, exchange and finance. Gonçalves (2011: 15) shows that the structural axis of the national developmentalism of the past¹⁰ were completely inverted, resulting in a development model that he called (in dialogue with Oliveira, 2007), a 'reverse developmentalism'. As he describes, the model induced a reprimarization of exports, de-industrialization and import of industrial goods (literally, the reversal of imports substitution), greater technological dependence and denationalization, loss of international competitiveness, greater external structural vulnerability as a result of the escalation of external financial liabilities, greater concentration of wealth and increased financial domination.

⁹ This idea contrasts with Boito's thesis, which argues that, during the PT administrations, the class fraction whose interest had been prioritised were those of the national bourgeoisie (see Boito, 2013). Gonçalves (2011) also argues the financial domination, which, for him is expressed in the capacity of surplus appropriation. As he says, 'the average rate of return (profit/equity) of the 50 largest banks is always higher than that of the 500 largest companies in all years 2003-10. In this period, the average rate of return of the largest companies is 11.0%, while the bank rate is 17.5%.' (Ibid.: 14, author's translation).

¹⁰ National developmentalism is characterized by three main strategies: industrialization, import substitution and state intervention and nationalism, reflecting the economic and political domination of the industrial bourgeoisie.

Socially, deindustrialisation entailed decreasing formal employment opportunities, coupled with dimming prospects for labour development. In face of that, Lula's social-liberal welfare policies became just a 'counterpart to the continuing liquidation of the manufacturing sector and the industrial working class, unfolding under the PT's watch.' (Oliveira, 2006: 15). Primary specialisation, in turn, generated an increasing demand for unqualified and low paid workers, which were able to create a positive effect on the distribution of earned income in the first decade of the century, yet not producing the same effect with regards to the distribution of wealth.

The ownership of land and natural resources in Brazil, which has historically a very narrow basis, became more concentrated after the 2000s. Based on the land registry of the National Institute of Colonization and Agrarian Reform (*Instituto Nacional de Colonização e Reforma Agrária*, INCRA), Teixeira compared the agrarian structure of 2003 and 2010, showing that large properties increased 16% in number and 48.4% in area – an additional of 104 million hectares, 70% of which in the Amazon region. In 2003, large properties corresponded to 51,6% of the total rural property area of the country and 56,1% in 2010 – all other property size groupings reduced their representation in the total property area (Teixeira, 2011). In 2010, there were 130.000 properties with an average size of approximately 2.500 hectares (Gonçalves, 2011: 13).

Pericas (2017) brings some interesting figures. In 2011, under Rouseff administration, the number of families settled under the Agrarian Reform Program hit the lowest record in sixteen years (Ibid.: 61). In 2012, 70% of the budget allocated to the INCRA was cut. In the same period, 42.9% of land reform settlers had abandoned their land and 35% had illegally transferred their property, according to INCRA's information (Ibid.: 60-61). With that in perspective, Oliveira's irony above repeats itself: many rural policies, including Agrarian Reform, became only mitigation to a state-sponsor erosion of the rural social reproduction. At the beginning of 2013, 36% of the families in land reform settlements depended on the Bolsa Família, that is, 'in every 10 rural settlers, between 4 or 5 did not achieve financial emancipation' (Ibid.: 59-60).

Paradoxically, the state capacity to support land reform settlers, smallholder farmers and the rural working poor was indirectly linked to the encroachment of capital (and thus, to its legitimacy) on land and natural resources. That way, tackling poverty and social inequality were rendered exogenous to capital-labour relations, and to the dynamics of income and wealth accumulation that bring them into being. Social programs, like Bolsa Família, could be presented as administrative solutions, depoliticizing both, poverty and inequality (Oliveira, 2006: 22). As said Sitcovsky,

The intellectuals of the Workers' Party, by presenting the thesis of post-neoliberalism, neo-developmentalism, and arguing for a virtuous cycle of growth, [...] created a mystifying [perhaps, fetishized] vision of reality, covering up reprimarization, deindustrialization and the deepening of financialization. Likewise, by declaring the end of extreme poverty through Bolsa Família, and as such reducing the social phenomenon of poverty to an income issue, they eventually reified it. (Sitcovsky, 2013: 135 author's translation)

Several authors have questioned the assertion over the decreasing rates of inequality and poverty in Brazil (Oliveira, 2009; Sitcovsky, 2013: 134). Amann and Baer (2012: 420) have asked 'whether further substantial improvements in the distribution of income can be realized in the context of a highly skewed pattern of asset ownership'. And skewed asset ownership does not only apply to land, as mentioned above, but also financial assets. '[...] the mere

payment of the domestic debt service, around 200 billion Reais per year, against the extremely modest 10 to 15 billion of Bolsa Família, does not require much theoretical speculation to conclude that inequality is increasing' (Oliveira, 2009, author's translation).

Through the management of the macroeconomic tripod,¹¹ the state has been a fundamental agent of a massive transfer of public income (and resources) to the private sphere, national and international. Such a development model enriched the rich and transferred to the poor (Saad-Filho and Morais, 2018: 121), using a policy formula that was itself unstable. Next, we note how the economic crisis that began to swell after 2011 – becoming critical after 2013 – was not fortuitous but the result of crucial political choices of the PT and the pattern of development they carried on.

The 2013 crisis: the economic turn

Primary commodity export could only be a provisional answer to BoP insolvency. The performance of the primary export sector temporarily reduced the indicators of external instability and vulnerability of the country, but has not eliminated the structural macroeconomic instability and external vulnerability of the development model itself, says Filgueiras (2013: 37). Yet, within a conjunctural horizon, the model's structural limitations were not expressed economically – and as such, were not confronted politically.

However, even under exceptional international market conditions, combined with a yearly harvest record, agribusiness exports, together with the extractive industry were insufficient to keep the current account at balance, showing that the primary specialization was a limited, externally dependent and ultimately inadequate strategy to keep the economy stable – and much less socially equitable. From 2008 onwards, the current account was in steep deficit. With the global economy in crisis, foreign investments stagnant, and the commodity price boom having come to an end, it became impossible not to run into a BoP crisis, followed by a recession.

The stagnation of FDI inflow led the country to rely on volatile and costly portfolio investment to finance the current account and the public debt. Yet, the cost of external liabilities and of the imports that the industry was now dependent on were both increased with the exchange rate devaluation led by instability, thus depreciating further the BoP. Of course, that is just one aspect of the crisis. The pattern of development is systemic, and so was the crisis, which expressed itself as also financial, fiscal, monetary and real crises.

That way, the PT project started to show its limits. As the crisis unfolded, it exposed not only its fragility but its ambiguous, if not deceived, representation of the working poor interests. Such a spell crumbled in the hands of Rousseff. Next section sheds light into the political crisis of representation and the recent authoritarian turn.

¹¹ The macroeconomic tripod consists of: 1) monetary policy tied to inflation targets (and high interest rates as instrument), (2) fiscal policy tied to annual targets of the primary fiscal surplus, and (3) a floating exchange rate regime.

The 2013 Crisis: the political turn

'I am no longer a human being; I am an idea – an idea fused with yours'
Lula's statement on the day of his imprisonment, 7th of April 2018.

Rousseff's administration reacted to the economic crisis by advancing the developmentalist agenda. The intention was to stimulate growth. Interest rate, for example, reached its lowest in years. That move, however, irritated the rentier coalition, which saw their economic privilege and political dominance being threatened. Unfortunately, Rousseff failed to produce the expected economic recovery, having underestimated the length of the global crisis and taken a series of precipitated and clumsy measures. In 2014, she was re-elected with a small margin of votes and, at the dawn of her second term, she receded her developmentalist campaign promises and gave way to the priorities of the financial market – this time irritating her supporters and being left on her own.

It is crucial to recall that, in June of 2013, the PT was taken by surprise when more than a million people took to the streets in rage expressing widespread dissatisfactions over the provision of public services around the country (Saad-Filho, 2015). The initial protest against the rise of bus tariff in Sao Paulo was catalysed after a ruthless political repression. From there, demonstrations multiplied in size, social composition and political demands throughout the month (Ibid.: 1). Although originally ignited by leftist claims such as free transport, the protests were soon taken by the 'entry of a disparate mass of middle-class demonstrators supported by the mainstream media' (Ibid.). Noticing the shift in the political character of the movement, the left withdrew from the streets, allowing the 2013 events to unfold into an anti-PT sentiment, which fermented and boiled over into Rousseff's impeachment in 2016.

As mentioned in the Introduction, the vote from the agribusiness caucus in Congress was definitive for the impeachment. That showed the productive coalition (the industrial and agrarian bourgeoisie) abandoned the PT to form with the rentier bourgeoisie a single bourgeois coalition. They voted against the developmentalist state, and as such, against their own interest, giving total control of politics to the financial capital. In his attempt to explain such a political move, Singer (2015) suggests that it was motivated by the fear of growing activism of the state – particularly experimented during Rousseff's first term – and the PT symbolic, moral and historical alliance with the working class. By giving up their immediate interest, the productive coalition avoided the greater risk of workers' take over of politics (Ibid.).

The PT's social base, even though not organized or politically identified as the working class, had elements of class and 'from below'. This gave to the phenomenon of Lulism an organic transformative potential not found in every experience of populism: the latent possibility of expressing demands that derive from, and are thus compatible with the material and political interest of the working class. In a country with an enormous social inequality as Brazil, the ruling classes experienced Lulism as a first manifestation of the class struggle, even though it represented an interesting formula to them. Lulism appeased social conflicts – of which the bourgeoisie is always very afraid – while supporting at least part of their own interest (Singer, 2013). Still, their relationship with Lula and the PT always carried a tension: the fear of radicalization.

It is possible to say that, during the PT cycle in power, certain transformations began to operate. It prompted, for example, an extensive and extended notion of citizenship and rights. That could unfold into a new moral ethos to redefine social relations in the country. What

could happen when the new mass of people with a diploma, and a level of schooling unprecedented in their family, do not find jobs compatible with their new material and cultural aspirations? Or what could be the reaction of those who got a diploma and a job, but just to realise that they still lack the most basic qualifications such as writing and text comprehension? The initial wave of protests in 2013 reflected the growing realization that life had improved inside the household, but not in the public space.

Safatle's (2018) comment is poignant: the dramatic situation of the latest presidential election was having those, who rightly wanted a rupture with the establishment, captured by and radicalised to the extreme right, and not the left. How did that happen? That is not an easy question to answer, but it is fundamental to the future of Brazil. The understanding of a hybrid type of populism, from above and below, provides some insights into the recent shift to authoritarian, morally conservative and ultra-liberal politics.

This paper has shown that the limits of the PT political project derived directly from its compromise with the rentier bourgeoisie. Even the forms of social provision the Party was known for became increasingly financialized and provided by the market, including land reform. The economic crisis it led the country into was a crisis of the neoliberal pattern of capital accumulation, externally dependent. Yet, carrying structural policies 'from above', the PT nurtured the view of a government 'from and for below'. Having done nothing to confront the power of the propertied and rentier bourgeoisie, having done nothing to organize and politicise its social base, having in fact concealed the antagonism in its class alliances and political representation, the party was left with no legitimacy, no base of defence, neither a line of attack when the economic crisis and the political accusations rebounded ruthlessly.

Lula and the PT – and, unfortunately, the left altogether – were at the mercy of the media and the conservative forces, who were left alone to frame the explanations for the crisis. A fictional 'radical left' – 'Marxist' and 'communist' – was forced to shoulder the burden of the economic, social and moral collapse of the country. The PT and the left were scorned and tarnished as irresponsible, incompetent, negligent and, of course, deeply corrupt.

The PT bet on its only option left: reinforcing Lula's leadership. Avoiding explanations and self-critique, the Party seemed to sustain the idea that the social successes of the 2000s were directly and solely Lula's merit and only him could bring them back. I would wager to say that the Party allowed for the political butchering of Rousseff – 'this inept woman' – in 2016, gambling that it could have its comeback with Lula in 2018. It is important to note that Lulism is still alive and well. Lula was the favourite candidate in the presidential campaign and was likely to have been elected in 2018 if the Superior Electoral Court had not blocked his candidacy a month prior to the election.¹²

Having benefited from social protection policies and much more, but having not had a chance to understand why they were limited and short-lived, Lula's social base remained faithful to him. Almost as a corollary, that same social base was incapable of forming a political understanding to organize and pressure against the impeachment of Rousseff – which only reinforces several aspects and effects of populism discussed in this paper. During the

¹² After a controversial and expedite trial, Lula received in April 2018 a 12-year sentence for corruption and money laundering, and was sent to jail. Still, his campaign continued until September when Brazil's top electoral court ruled that his candidacy should be barred. At the day of Lula's imprisonment, he proclaimed: 'I am no longer a human being; I am an idea – an idea fused with yours'. The PT's substitute candidate, Fernando Haddad, began his campaign a month before the election, adopting a strategy to make him a virtual image of Lula.

presidential campaign, Lula tried to unite the organised left – but around him – only to achieve the opposite.

The Brazilian people, resentful of the low quality of public services and other effects of the neoliberal order, indiscriminately voted for the dismantling of the state and absolute neoliberal hegemony – a tragedy that Lula bears responsibility. Bolsonaro was elected as the option to re-moralise the public life, to bring order and put things right. But whose order?

Populism from above and below

[...] for Gramsci, hegemony in a capitalist social order had been the moral ascendancy of the possessing over the labouring classes, securing the consent of the dominated to their own domination' (Anderson, 2011)

Lula's model of populism is not easy to grasp. It encompasses important paradoxes, besides challenging the literature on populism in some established ideas without undermining its own case. From its historical, social, economic and ideological configuration, Lulism does not fit in simple descriptions such as left-wing populism, even if that was the political orientation and identity of his party. Lulism is nuanced. Its forms of political expression and social representation gravitate from Capital to Labour, from conformity to change, orthodoxy to heterodoxy, from above and below. This last section goes back to the discussion on populism to elaborate on Lula's model.

It was mentioned earlier that Laclau's envisioned a 'populism of the dominated' (1977) – which others have framed as a radical populism (positive and desired). It seems important, indeed, to differentiate a populism that comes from below. First, it seems that the working class (or the dominated, in Laclau's terms) predominantly compose 'the people'. Second, their demands tend to be progressive, reflecting elements of their class position. Singer understood Lulism as a model of populism 'from below', representative of the working poor: a complete programme of the sub-proletariat. His understanding, though, differs from Laclau's populism of the dominated, and both, from the understanding developed here.

First, for Laclau, populism relates to the capacity to challenge and possibly overtake hegemonic power promoting an antagonistic discourse and ideology. Drawing from Gramsci, he understood hegemony as a discursive and ideological dominance over the whole of society achieved through consent, or neutralisation of potential antagonism (Ibid.: 161-62). Deriving from that, 'populism of the dominated' implies that it is those 'from below' who articulate a new vision that directly challenges the dominant, opening the chance for an ideological ascendancy of the dominated over society. This understanding is problematic and cannot account for Lula's model of populism.

On the one hand, Lula's social base was predominantly formed by the main fraction of the working class. They also asked for income redistribution, a progressive and popular demand, which reflected their social roots from below. Lula promoted its personal ties with the poor and catered to their real interests. That makes some aspects of government 'for and from below', giving a sense that 'the people' were now closer to power. But, on the other hand, his social base was also conservative, subservient to the economic and institutional order, and expecting changes to be organized from above. Distancing himself from his political past as a leader against the social order, Lula concealed social antagonism. In that sense, it would not

even characterise as populism for Laclau. Boito has also argued that Lula's social base, being disorganised and presenting diffuse, disarticulated demands, did not have a complete political programme and as such, could not have an ideological ascendancy (Boito, 2013: 173).

Singer does not give defining importance either to antagonism or hegemony. Still, for him, Lulism could be considered as populism of the sub-proletariat – or as called here, populism 'from below' – even if their programme was not hegemonic but reconciled with a bourgeois agenda. In Singer's thesis, Lulism was a successful model in arbitrating the interest of the two essential classes (see Boito, 2013).

This, however, is also problematic. Agreeing with Boito (2013), Singer seems to disregard the asymmetries in the power relations between the two essential classes. At a more theoretical level, Laclau's 'populism of the dominated' suffers from similar neglect. Considering hegemonic control as only a matter of discursive and ideological ascendancy, he confuses the very notion of populism. An ideological ascendancy of the dominated over the state's politics will be populist when (and because) it is detached from a correspondent structural transformation on the control of property and market relations, which are the material forms of domination – and the most tangible ones. It is crucial not to confuse see styles of populism 'from below' and emancipatory politics. The difference is where the antagonism lies.

According to the understanding explored in this paper, populism requires that, even if the state appears to represent interests of the subaltern, even if there is a strong discursive and ideological antagonism with the elite (or the dominant), in practice, (and for different reasons) the state maintains or even increases social and material structures that are antagonistic to the class character of 'the people' themselves. The antagonism lies between ideology and practice, although that is not perceived; it is fetishized. In the case of progressive and possibly emancipatory politics, ideology and practice cohere. The antagonism is formed in the very class struggle and confrontation, precisely to alter the correlation of power in favour of the working class.

In a case of populism from above, 'the people' is likely to be socially more heterogeneous, (because) aggregated by a more arbitrary and conservative political agenda, and as such, distant from material and social (class) interests. As a result, this type of populism might confront and overtake the power from the dominant fraction of the bourgeoisie but sponsor another. As envisioned in Marxism, populism (either way, from above or below) is in opposition to emancipation; 'the people' and the working class more broadly are its main victim, even if that can assume very different degrees.

In conversation with the Gramscian theory on hegemony, as well as Singer's thesis, Oliveira (2006) argued that Lulism reverted Gramsci's formula: instead of the moral ascendancy of the possessing over the labouring classes, the dominant was bent, consenting to be led by a representative of the dominated, yet simply to reinforce the structures of their own exploitation – a 'hegemony in reverse' (Ibid.). Lulism was the unification of the main fraction of the working class without class politics, class forms of consciousness, organization or political struggle. Lulism was also the election of an authentic working-class president devoid of working-class power – even though part of the left in Brazil pretended that was the case (Oliveira, TV interview, *Roda Viva*, 2012). That is exactly the uncritical treatment to – or the fetish of – transformative politics, so emblematic of populism of the left. Lulism, as argued here, was hybrid, dressing 'from below' its essence 'from above'.

While the dominant classes (banks, financiers, multinational corporations, national and international holders of public debt bonds) benefited from structural macroeconomic policies, the working class benefited from policies whose reproduction and expansion depended on fortuitous and provisional opportunities. Under the leadership of ‘the president of the poor’, there was no attempt to dispute the control over the (re)organization of property, production, appropriation and accumulation within society. The PT promoted a marginal income distribution but no real transformation – much less an inversion – in power relations in society and in the political system. So, if there was an ascendancy of a new political and ideological pattern reflecting the aspirations of the poor, it was innocuous from the viewpoint of social and political structural transformation.

The achievements to the masses were fundamentally limited in scope, scale, and duration. Their immediate interests were only temporarily and partially compatible with the political and economic interests of the Brazilian ruling classes. That ‘compatibility’ did not escape from carving external dependence and crisis. As discussed, the expansion of agro-commodities production and export discloses the ambivalent class character of the state’s politics in this period. Lula’s political project did not correspond to the ‘class mandate received at the polls’ (Oliveira, 2009 author’s translation). The PT governed for large capital, for the privileged and already powerful and transferred to the poor.

In the PT period in government, the masses were political agents in the instance of elections, expressing preferences, asking, hoping, waiting for support and change, but their political participation was rather instrumental. The myth of Lula’s political project was attached to the myth of creating an endogenous process of growth, neo-developmental, and social equity without attempting to renegotiate power or rallying popular power in society and in the state decision-making.

In some respects, *petismo-lulismo* represents a far purer populism – the impossibility of a politics based on organized class – than the classic cases of Vargas, Perón and Cárdenas. These were, in various ways, authoritarian forms for the inclusion of the working class in politics [under the tutelage of the bourgeois state]. Today’s neo-populism represents not the authoritarian inclusion but the democratic exclusion of those classes from politics. (Oliveira, 2006: 19)

Delivering material improvements to the poor without class struggles, Lulism avoided real solutions to social ills, reinforced a passive political actor, allowed or stimulated political lethargy, constrained more ambitious demands and detracted the critiques from the left and its own organised social base.

The MST remained critical and active during the whole period, but it did not escape the effects of populist ambiguities of the PT’s politics over its own base. While they were at the forefront of the conflict with the agribusiness expansion, they were also beneficiaries of several social and income policies, both promoted by the government. The Movement was cornered, and even if still politically mobilised, it became less effective. Agrarian reform, its main demand, did not advance, and the MST gave more emphasis to economic-corporate demands, partly met by public programmes. To a certain extent, the Movement became dependent on Lulism (Almeida, 2012).

Conclusion

The contradiction between ‘the sheer electoral weight of the poor, juxtaposed against the sheer scale of economic inequality’ makes the Brazilian democracy latently explosive (Anderson, 2011). For that reason, the Brazilian political system, including its democracy, has also been utterly authoritarian or deceptive, conditioning and constituting itself a historically entrenched structure against class formation and struggle. Not surprisingly, populism, coup d’états and dictatorships permeate Brazil’s republican life. Ayers and Saad-Filho (2014: 4) recall several events in history that unambiguously demonstrate how ‘political democracy was never meant to reach the economic realm’. The impeachment of Rousseff and the imprisonment of Lula are certainly illustrative of their point. As the authors explain, the ‘structural limits of capitalist democracy come into view when attempts to expand political control over the economic affairs are blocked, regardless of their popular backing or even legitimacy within the established order’ (Ibid.).

Since the impeachment process, the MST became more openly supportive of the PT, including promoting a strong Free Lula campaign. While, in my understanding, they have been at the right side of History, their overt participation in Lula’s 2018 presidential campaign seems less clear whether it reflects a questionable pragmatism or a regrettable Lulism. To unleash the transformative potential from below, the populist fetish that gave rise to Lulism must be overcome. Social transformation in Brazil will not come from above, or without class confrontation.

Lula’s populist formula not only cast down the goal of development with social equity but launched Brazil on a long-term trajectory of instability and crisis (Gonçalves, 2011: 16). ‘Should passive improvement ever become active intervention’, completed Anderson (2011), ‘the story would have another ending’. From now on, a critical understanding of the mistakes of the past should guide how and in which basis social unification should be organized, and most important, for what it is organized.

‘A luta continua’, but class struggle (and class analysis) must resume its critical role.

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The Emancipatory Rural Politics Initiative (ERPI) is a new initiative focused on understanding the contemporary moment and building alternatives. New exclusionary politics are generating deepening inequalities, jobless 'growth', climate chaos, and social division. The ERPI is focused on the social and political processes in rural spaces that are generating alternatives to regressive, authoritarian politics. We aim to provoke debate and action among scholars, activists, practitioners and policymakers from across the world that are concerned about the current situation, and hopeful about alternatives.

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