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JUST TRANSITION – A GLOBAL PERSPECTIVE

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'Just Transition' in the Global South: Mission Impossible? The Perils of the Transition in Mexico and Ecuador

Abstract *Historically, 'just transition' speaks to concerns of workers of 'dirty industries' in the Global North in the light of environmental regulations and (possible) impacts on their working conditions and job positions. Increasingly, the concept is used to highlight issues of social justice in transitions to a low-carbon economy based on renewable energy sources. Focusing on the juncture triggered by the current climate change-driven stage of global capitalism, we emphasise the tension that arises between the notions of 'national development', 'global sustainability', and a 'just transition', and argue that current transition politics and pathways tend to (re)produce extractivist and rentier logics as well as socioecological conflicts in the Global South. We illustrate our argument by delving into the political economy and political ecology of contemporary Mexico and Ecuador, where we also identify the perils of following transition pathways that limit a 'just transition'.*

Keywords *Mexico, Ecuador, climate change, rentier societies, extractivism, political economy, political ecology*

Introduction[1]

Governments, international organisations, civil society groups, and segments of the business sector all agree that a transition to renewables is crucial for stabilising global warming at 1.5 degrees above preindustrial levels. Social science studies on energy (transitions) contrast this technical and political-rhetorical consensus by highlighting that the ways of implementing transition policies and projects and the restructuring of labour is contested by different actors. In particular, research from a political

economy and/or political ecology perspective has pointed to the reproduction of socioecological inequalities (Sovacool 2021) and engaged with claims for a 'just transition' (McCauley/Heffron 2018) involving different frameworks of justice (Lehmann/Tittor 2021).

We build on a growing body of literature on the implications of transition policies in the Global South (Alarcón et al. 2022), on contested renewable energy projects (Gorayeb et al. 2018), and on the extraction of raw materials for e-technologies (Prause/Dietz 2020; Dunlap 2019); therefore, in this contribution, we first challenge the concept of 'just transition' by inquiring into structural realities of Global Southern countries that stem from their traditional position in the international division of nature as providers of raw material and energy resources for the world economy (Alarcón 2022). We argue that the settings for the energy transition in the Global South, and particularly in Latin America compel us to rethink the notion of 'just transition' from a more global perspective.

After that, we delve into the political economy and political ecology of Mexico and Ecuador at the juncture of the climate change-driven stage of global capitalism. We link current academic debates on socioecological impacts and conflicts around energy transition to research on Latin American rentier states and extractivist economies to exemplify some similar structural conditions shared with other countries of the Global South while drawing attention to the perils of the current transition. We chose Mexico and Ecuador as empirical examples since both countries' state revenues rely heavily on the fossil sector; thereby, the hydrocarbons sector is of central importance to the state (Alarcón 2021; Tetreault 2020). Further, both countries have reserves of minerals needed for renewable energy technologies, such as copper (Ecuador and Mexico), silver (Mexico), and lithium (Mexico), and the mining of these minerals has been highly contested up to date (Jenkins 2017; Tetreault 2015). Social movements in both countries question current environmental and energy policies and provide counter-narratives to development imperatives based on natural resource extraction (Rival 2012; Kerkeling 2013; Alarcón/Rocha/Di Pietro 2018). At the same time, Ecuador and Mexico differ vis-á-vis the size of their national economies, their geopolitical position and integration into the world market, as well as regarding concrete renewable energy policies, such as the support and implementation of wind and solar power projects

(Lüpke/Well 2020; Arroyo/Miguel 2020). Yet, our contribution does not claim to be a comparative analysis in the strict sense but rather explores and discusses structures and dynamics that are of relevance to debates on transition and justice in differing contexts.

Since most Global Southern countries, such as Mexico and Ecuador, depend on rent generated by natural resource exports to finance development and social projects and the energy transition itself, in our discussion we emphasise the tension that arises between the notions of 'national development', 'global sustainability', and a 'just transition'.

2. 'Just transition' in the Global South?

Thanks to the initial impetus of trade union organisations in the Global North during the final decades of the last century and the struggles of social movements regarding inequalities in the context of the energy transition, discussions on 'just transition' now have an assured place in international climate change governance negotiations. As a concept, 'just transition' has transcended its origins, which were strictly in the labour field, which initially focused on compensating workers in extractive industries affected by environmental and climate policies (McCauley/Heffron 2018). As a global discourse, 'just transition' is increasingly part and parcel of transnational debates on reconciling social equity with the need to mitigate climate change. A broader academic and political debate on 'just transition' has considered contributions on energy justice (Jenkins et al. 2016), environmental, and climate justice (Schlosberg/Collins 2014) to acknowledge responsibilities and inequalities across scales and along different axes of differences, such as class, gender, and race/ethnicity (see e.g. Sundberg 2008), and to highlight injustices concerning the distribution of costs and benefits, the participation of different actors in political processes, the recognition of knowledge and practices, as well as the reparation for past and present damages that go beyond selective compensatory measures (Lehmann/Tittor 2021).

Different actors in the Global South refer to this discourse in debates on energy transitions, or at least with regard to the need for benefitting from transforming e-value chains and possible hydrogen markets. However,

a growing body of literature questions the discursive-political setting of 'just transitions' by highlighting structural conditions found in peripheral states and the political ecology of current energy transitions.

Regarding structural conditions found in peripheral states, scholarly debates have argued along three interrelated lines of inquiry associated with contextual settings and perspectives for 'just (energy) transitions' in the Global South.

The first argument is concerned with the historical dependence of regions in the Global South on rent generated by extractivism. We understand extractivism as the persistence of a development model grounded in extraction of natural resource and the commodification of raw material in the world market without significant value added (Alarcón 2023; Gudynas 2015). In the Global South, rent generated by extractivism determines the course of the national economy and the reproduction of society; in countries where the economy hinges on revenues generated by natural resource exports, rent is typically distributed throughout society, following political and clientelistic criteria (Beblawi/Luciani 1987; Alarcón 2021). Another key feature of some peripheral societies is that rent allocation leads to the impossibility of diversifying their economies beyond the natural resources sector and moving towards more sustainable production patterns (Auty/Furlonge 2019; Peters 2019). Such discussions have taken place in academic literature since the early 1990s within the framework of the "resource curse thesis" (Auty 1993). The dependence on natural resource exports results in the dependence on imports of manufactured goods and technology. This argument refers to the resource base of energy transitions (the endurance of extractivism), as well as to the technological base of energy transitions (a deepening dependence on technology developed abroad).

During the climate change-driven stage of global capitalism, these features translate into what might be called "reloaded" extractivism (Alarcón et al. 2022), which refers to enhanced mineral extractivism for the sake of the 'green' energy transition, together with boosted fossil fuel extractivism (coal, oil, natural gas) to cope with the current energy crisis, in flat contradiction of the Paris Agreement. On the one hand, as the Global North yearns for alternative fossil fuel suppliers, natural resource-rich Global Southern countries are expanding their extractivist frontiers – such as in the case of the Congo Basin – and might seek to deplete their oil,

coal, and natural gas stocks before they become unprofitable in the long term due to the commitment of consumer countries with the Paris Agreement and efforts to switch to low-carbon energy sources. On the other hand, essential for the current stage of the energy transition is the substitution of carbon-based fuels in electricity generation and land transportation (i.e. cars, pick-ups, buses, trucks). This endeavour requires raw materials, many of which are often referred to as "critical minerals", indispensable for scaling up transition technologies (IEA 2021): lithium, nickel, and cobalt which are essential for batteries used in solar photovoltaic systems and electric cars; rare earth metals which are used in both wind turbines and electric motors; and copper which is used in connections and connectors and power grids.

Critical minerals, or the need for them, already reproduce or renew extractivism for the sake of the energy transition. This has been framed as "green" (Voskoboynik/Andreucci 2021) or "renewable" extractivism (Soto/Newell 2022; Del Bene et al. 2018). Some of these theoretical and methodological contributions might also prove useful in approaching the next stages of the energy transition, which deal with the massive upscaling of wind and solar technologies, the takeoff of technologies and innovations aimed at using other renewable sources, and the implementation of green hydrogen production.

A second argument regarding the juncture in the Global South involves the institutional actors in charge of undertaking the energy transition. In the Global North, well-established markets with the capacity for technological innovation are being provided with (or restricted from) the necessary environment (namely mainly financial support and legal frameworks) by welfare states with skilled public sectors which have more or less room to manoeuver (Alarcón et al. 2022; Krause et al. 2022; Swilling/Annecke 2012). In the Global South, in contrast, the role of the peripheral state in setting the regulatory and institutional framework for energy transitions is complex, contested, and context-dependent. Social forces, which bet on a strong public sector and state intervention, argue in line with the Latin American tradition of (under-)development studies, which pioneered the approach to the role of the national state in national development (Sunkel 1976: 8; CEPAL 1971), as they censured local bourgeoisie for their zero contribution to (top-down) development. Central to the critique of the

private sector of the economy is (1) the nexus between the bourgeoisie and the traditional oligarchy, i.e. the economic and sociopolitical order linked to transnational capital through agro-exporters and landowners (Alarcón 2021: 63); and (2) the rentier behaviour of local economic elites which prioritises access to natural resource rent over profits from more productive investments (such as manufacturing) or over the expansion of the domestic market (Katz 2022: 11ff). As the private initiative is deemed unable or unwilling to prompt economic development at the national level, the developmentalist expectation or the expectation to lead top-down development shifts to the realm of state bureaucracies and political elites.

For many peripheral states in the Global South, particularly in Latin America, the energy transition itself might be regarded as an avant-garde developmental endeavour in a context where social development projects, such as access to public health and education, social security, and even access to electricity, remain unfinished. For instance, the Economic Commission for Latin America and the Caribbean contends that 17 million people have no access to electricity and 75 million have no access to clean energy for everyday cooking in Latin America (CEPAL 2022). With this in mind, how to finance the energy transition during the climate change-driven stage of global capitalism is an open question. A recent study by the Inter-American Development Bank (Solano-Rodríguez et al. 2019) estimates that up to 80 percent of the oil reserves of Latin American countries could be left in the ground since it would no longer be profitable to exploit them by around the year 2030; if the world is committed to achieving the goals of the Paris Agreement, oil export revenues in Latin American countries could be reduced by half. To compensate for empty pockets left by natural resource booms and busts, recent economic history shows that peripheral states tend to seek foreign capital investment and international cooperation for developmental projects. This might cause external debt to swell further.

A third argument concerns the reproduction of socioecological inequalities in regions where mines and/or renewable energy projects are located. The term 'socioecological inequalities' draws on a broader understanding of inequalities beyond that of simply looking at income. It is concerned with the unequal power resources for coping with changing environmental conditions (e.g. environmental degradation, floods, land-

slides), for benefitting from or having to bear the costs of appropriating nature (e.g. a mine; or a solar park, for which land is appropriated), for defining what counts as knowledge about 'environment', 'natural resource', the associated environmental problems and possible solutions (e.g. does the solution to the problems caused by intensive monocultures lie in digital agriculture or agroecology), and for negotiating political measures, as well as the access to and use of resources (e.g. land, water) (Dietz 2017). Academic literature provides many instances of studies in which renewable energy projects reproduce socioecological inequalities in the Global South (e.g. Del Bene et al. 2018). In cases where actors politicise these inequalities (Dietz/Engels 2020), "reloaded extractivism" (might) mean 'reloaded conflicts' in the extractivist frontier. In the next stages of the energy transition as mentioned above (massive upscaling of wind and solar technologies, takeoff of technologies and innovations aimed at using other renewable sources, as well as the implementation of green hydrogen production), conflicts and inequalities related to access to, and tenure of, land will play a significant role. Studies already point to the role of land in conflicts around renewable energies and for the reproduction of related socioecological inequalities (Backhouse/Lehmann 2019). For instance, whereas green hydrogen plants in themselves take up little space, wind farms and solar power plants that generate the green electricity necessary for hydrogen electrolysis require significant land area. Moreover, access to a continuous supply of water for the electrolysis of green hydrogen has to be assured.

3. The Perils of the Transition: Insights from Mexico and Ecuador

We support our argument that the current transition tends to reproduce dynamics of dependency and rentierism, as well as socioecological conflicts, by exploring the continuities and change of the political economy and the political ecology of contemporary Mexico and Ecuador. Albeit with varieties in the concrete forms of social reproduction, as well as dynamics involving the appropriation of resources, we show that specific countries such as Mexico and Ecuador have to deal with the structural conditions mentioned above and with new dynamics, by shedding light on the structural dependencies related to the export of natural resources

and the import of technology, the centrality of rent generated by fossil fuel extractivism to state revenues and labour relations, and the dependencies on (subsidised) energy carriers for domestic consumption. Further, we describe the reproduction of socioecological inequalities related to 'reloaded' extractivism.

3.1 The reproduction of structural dependencies and the centrality of oil rent

Capital accumulation in Ecuador hinges on the primary sector of the economy in general and on oil extractivism in particular. Natural resource exports as a share of the country's total exports reached the astronomical figure of nearly 94 percent, and those of crude oil amounted to 42 percent (UNCTAD 2021: 99) (See Table 1). Although no nationalisations took place during the first oil boom (1972-1981), the Ecuadorian state engaged in a struggle with multinational oil companies over the capture of a larger portion of oil rent. The creation of a state-owned oil company, the renegotiation of concessional schemes, and the integration of the Organization of Petroleum Exporting Countries (OPEC), not only assured the national state a predominant place in the economy and in the control of the oil sector in the long term, but also shaped the social perception of sovereignty and development that remains up to today (Alarcón 2021). On average, oil rent contributed about 10 percent to GDP during the last 25 years, while it finances one-third of the government's expenditure (World Bank 2023a; MEM 2021).

During the juncture triggered by the global energy transition, reloaded' extractivism in Ecuador is showing up twofold. On the one hand, President Guillermo Lasso announced the intention of the government to double the current oil extraction of approximately 500,000 barrels a day during his administration (Decreto Ejecutivo No. 95, 7 July 2021). The exit from OPEC in early 2021 arguably paves the way for attracting foreign investment to the oil sector to attain the government's goals. On the other hand, for the last two decades, Ecuadorian governments have supported the takeoff of mining through a generous legal framework that opens the door for fiscal incentives. *El Mirador* open pit mine, the first large-scale copper mine in Ecuador, granted a concession for 30 years to a Chinese company and began operations in 2019. Revenue from *El Mirador* is

showing up in the accounts of the Central Bank of Ecuador (BCE 2021: 14), and it is expected that another two copper mines, *Warintza* and *El Domo*, both concessioned to Canadian companies, will begin operations in 2023. Contrary to the oil sector, mining activities are dominated by (foreign) private initiatives; hence, the mechanisms for the state's rent appropriation vary. In the absence of a state company, the Ecuadorian state collects royalties for the mining concessions and imposes taxes on private companies' revenues. Mining extractivism contributes nowadays less than one percent of GDP. However, the bet on a mining boom is set.

Despite enabling capital accumulation, natural resource extractivism traditionally inhibited economic development thus, Ecuador did not accomplish the adoption of more effective production processes to leave behind dependence on natural resource rent and move towards reliance on more advanced sectors of the economy. The medium and high-tech manufacturing value-added, an indicator of the proportion of technological value added to total value added of manufacturing, and therefore of the degree of industrialisation of a country, hardly reaches 10 percent on average over the last 25 years (World Bank 2023b). In comparison, the medium and high-tech manufacturing value added in industrialised countries easily reaches 50 percent. It goes without saying that during the energy transition, Ecuador will have to purchase photovoltaic panels, batteries, wind turbines, electric cars, and other necessary technology from the international market.

The world's biggest oil exporter in the 1920s, Mexico saw its importance slightly decrease in light of the Venezuelan oil boom in the 1930s. In 1938, President Lázaro Cardenas nationalised the Mexican oil industry and oil became a symbol of national sovereignty from the US and US-based/foreign companies (Daniels 2002). With the discovery of new oil fields across the country up to the 1970s, oil extraction as well as the state-owned company grew significantly (Maihold 2010). Despite the sovereignty discourse originating in oil nationalisations, political elites in favor of a comprehensive liberalisation of the energy sector were able to prevail with constitutional reform that allowed the liberalisation of the energy sector in 2013/14 (Alpizar-Castro/Rodríguez-Monroy 2016). Despite a decrease in oil extraction, from nearly 1.5 million barrels per day in 2010 to 1.1 million barrels per day in 2021 (SENER 2021), Mexican dependency on fossil fuel

extractivism is still high: oil revenues (including taxes and direct payments from the state-owned company) account for over one-third of government income; thereby, oil rent contributed on average three percent to GDP (World Bank 2023a). About four-fifths of Mexico's oil is exported to the United States, which depends heavily on Mexico as one of its principal sources of oil.

Mexico leads the world in the extraction of silver and is among the 10th-largest producer of gold and copper.[2] From 2019 to 2020, the export of precious metals (gold, silver, platinum, and palladium) extracted in Mexico increased by around 1.3 percent. Practically non-existent taxes and other pro-mining policies, particularly under the presidents Fox and Calderón from the right-wing Partido Acción Nacional (PAN, 2000-2012), contributed to the image of mining bonanzas in Mexico. More recently, debates revolve around the discovery of large deposits of lithium in clay in the northern state of Sonora. In light of conflicts surrounding extractivism and the lack of generated welfare, both for the people affected and for the national state, President López Obrador (AMLO) nationalised lithium activities in 2022, leaving contracts with the Chinese lithium giant Ganfeng International for the commissioning of the Bacanora Lithium mine in the Northern state of Sonora untouched. In the case of lithium, AMLO envisions national extraction of the mineral and the production of batteries, rhetorically referring to Bolivia as the role model for their intent to keep large parts of the lithium value chain in the country. Contrary to Ecuador, Mexico's integration into the world market is thus that of a semi-peripheral country. Natural resource exports as a share of the country's total exports amount to nearly 16 percent (UNCTAD 2021: 158) (See Table 1). The secondary and tertiary sectors of the economy contribute together more than 90 percent of GDP. Thereby, the medium and high-tech manufacturing value added has amounted to 41 percent on average during the last 25 years (World Bank 2023b). This means that Mexico is nowadays able to export major manufactured products such as machinery, transport and electrical equipment, chemicals, and petroleum products.[3] During the juncture triggered by the energy transition, the growing intent to boost turbine manufacturing in Mexico itself can be attributed to the history of cooperation between Mexican and foreign companies in the machinery and manufacturing sector (e.g., with Germany).

	Fossil fuels	Agricultural products	Minerals, metals, and ores	Total Natural Resources
Ecuador	41.7 (mainly crude oil)	49.7 (mainly banana, and cocoa beans)	2.5	93.9
Mexico	5.8 (mainly crude oil)	7.4 (mainly vegetables)	2.7 (includes precious stones and non-monetary gold)	15.9

Table 1: Exports of Natural Resources as Share of Total Exports 2018-2019, Ecuador – Mexico (percentage)
Source: UNCTAD (United Nations Conference on Trade and Development) (2021): State of Commodity Dependence 2021. Geneva: UNCTAD.

3.2 Dependency on 'cheap oil' for domestic consumption

The latest energy balance of Ecuador shows that oil accounts for more than three-quarters of the energy needs of the population. The country generates one-fifth of its electricity supply by burning crude oil, oil products, and, to a lesser extent, natural gas. In addition, the land transport sector relies almost exclusively on oil products (diesel and gasoline). Furthermore, liquefied petroleum gas covers more than half of the needs of the residential sector, i.e., households (see Table 2). In contrast, the contributions of wind and solar power to the energy mix are still negligible (MEM 2021). To remedy this situation, Guillermo Lasso's government intended to concede land areas with wind and solar potential to private enterprises (Decreto Ejecutivo No. 238, Quito, 26 October 2021).

Subsidies on oil products for domestic consumption, or 'cheap oil', reinforce their high penetration in the national energy mix. These were granted during the first Ecuadorian oil boom (1972-1981). Fifty years later, citizens regard subsidies on oil products as a natural consequence of living in a petro-state, a "quasi-naturalized right" derived from living in a natural resource-rich country (Alarcón/Peters 2020, 257). Historically, govern-

ments' attempts to cut such subventions frequently resulted in social unrest and political turmoil. During the latest episode in 2022, the maintenance of subsidies on transportation fuels (diesel and gasoline) was among the key social and economic demands of protesters. In 2019, protests triggered by the former president's plan to scrap subsidies on diesel and gasoline converged on a wave of protests related to energy prices, not only in countries of the Global South (McCulloch et al. 2022). Subsidies on oil products cost the Ecuadorian state an average of $2.3 billion per year, the same amount that the country invests every year in public health (Schaffitzel et al. 2019; CEPALSTAT 2022).

Mexico's energy needs also rely heavily on fossil fuels. Oil and natural gas account for nearly 87 percent of the national energy demand. Almost two-thirds of the country's electricity generation depends on natural gas. As in Ecuador, the land transportation sector hinges on oil products. Liquefied petroleum gas, in turn, covers approximately one-third of the energy demand of households (SENER 2021) (see Table 2). We observe similar dynamics as in Ecuador, particularly protests tied to rising energy prices. Interestingly, in the late 2000s, former union members and workers of the dissolved state-owned electricity company *Luz y Fuerza del Centro* and its rebellious union of the SME (Sindicato Mexicano de Electricidad) joined forces with a movement against the high prices (*altas tarifas*) of the CFE (Comisión Federal de Electricidad), and, after being cut off from the grid, installed connections again (Kerkeling 2013). In the Isthmus of Tehuantepec, protesters against large-scale wind farms demanded cheap or free electricity for the people affected by various inequalities associated with the implementation of mega wind farms (Lehmann 2018). AMLO partly takes up this critique as an argument against legal changes to support renewables. In general, the energy policies of his government target the renewed strengthening of the state-owned oil company (Hernández Ibarzábal/Bonilla 2020).

In this context, two facts make the slope towards the energy transition far more slippery in Mexico and Ecuador: the strong penetration of fossil fuels and oil products in the domestic economy and the energy mix, on the one hand, and, on the other hand, the imperative of keeping energy prices low for end users, which might be understood as a natural demand of citizens living in natural resource-rich countries. Yet, the protest against

	Ecuador	Mexico
Fossil fuels participation in the domestic energy supply	81.6 (oil and natural gas)	86.9 (coal, oil, and natural gas)
Land transport sector	99.0 (diesel and gasoline)	99.0 (mainly diesel and gasoline)
Residential sector	51.8 (LPG)	34.5 (mainly LPG)
Electricity generation	20.1 (mainly oil products)	66.3 (mainly natural gas)

Table 2: Fossil Fuels Penetration in the Domestic Energy Demand 2020, Ecuador – Mexico (percentage)
Source: MEM (Ministerio de Energía y Minas) (2021). Balance Energético Nacional 2020. Quito: MEM; SENER (Secretaría de Energía) (2021). Balance Nacional de Energía 2020. Mexico, D.F.: SENER.

cuts in subsidies and high energy prices also reflects the inability of many low-income households to pay these prices and, therefore, their dependence on subsidies.

3.3 Socioecological inequalities and new sacrifice zones

Recent studies (see e.g., Voskoboynik/Andreucci 2022) highlight that the extraction of minerals and fossil fuels is bound to socioecological inequalities and the production of sacrifice zones, that is, spaces where environmental degradation, pollution, and the social impacts of energy infrastructures and mines are deemed to be necessary for the sake of 'development' or, more recently, 'sustainability'. In some cases, these inequalities tend to be reproduced in renewable energy projects.[4] Many of these inequalities have been politicised and fueled by conflicts concerning the relative distribution of costs and benefits. In the case of mining, negative impacts on local environments, or the lack of financial benefits for affected communities, recurrently aggravate socioecological conflicts between companies, states, communities, and protest movements, as well as within communities. It is important to note that while some communities demand

a share of the benefits from mining, others reject mining projects altogether (for Mexico see Torres Wong 2019). The creation of benefits via jobs and income is further bound to the materiality of the raw materials or the technology needed to extract, harvest, or harness them. In Mexico, large-scale wind farms, for instance, need a lot less workforce after the construction phase is completed, thus limiting job opportunities. Compensation for or donations to the community from the corporations or the state is often perceived as disproportionate to the demands of those affected and can even fuel social conflict, often exacerbating (historical) social conflicts in communities that are divided between supporters and opponents (e.g. Cruz Rueda 2011; Lehmann 2018). So far, the bulk of renewable electricity in the Mexican grid is generated in large hydropower dams in the poorer southern states, such as Chiapas. In general, studies highlight that the concrete sites of extraction and/or implementation of projects are situated to a large extent in the semi-/periphery, and are part and parcel of past, present, and future socioecological or eco-territorial conflicts (Svampa 2012), both in Ecuador and Mexico. Studies on extractivism agree on the core role of land relations in these conflicts (Dietz/Engels 2020; Jerez et al. 2021; Tittor 2020). Social science studies on energy stress renewable energy's need for land (McCarthy 2015), and in many parts of the world, land conflicts are central to contestation around renewables (e.g. Gorayeb et al. 2018). In Mexico, (unresolved) conflicts around land tenure and the political authority to decide on land use and land use change are at the core of conflict dynamics around renewable energies (Avila 2018), mining (Azamar Alonso/Téllez Ramírez 2022) and fossil fuel extractions (see the contributions in Tetreault 2020). This is strongly related to a (lack of) acknowledgment of Indigenous land titles and customary land tenure. The case of oil extraction in the Ecuadorian Amazon has received prominent attention via the political initiative to leave oil underground – the Yasuní ITT – which aligned not only with environmental and climate concerns but also with Indigenous rights (Alarcón/Rocha/Di Pietro 2018). The oil frontier of the Ecuadorian Amazon continues to be contested by Indigenous peoples. In Mexico, reloaded extractivism of fossil fuels seems to drive conflict in Zoque communities in Chiapas[5], a state with both large oil deposits and the continuing presence of autonomous *Zapatista* communities taking a strong stance against extractive activities (Barreda 2007).

Conflicts involve further procedural issues and possible participation in decision-making. In general, energy, and mining policies in Mexico and Ecuador are under the authority of the central government. Yet, (Indigenous) social movements' struggles for participation rights, such as the right to be consulted on so-called development projects, resulted in some instruments which could, theoretically, increase the inclusion of affected communities in decision-making. While studies show that instruments such as Declaration 169 by the International Labour Organization (ILO) on the Free, Prior, and Informed Consultation or national legislation can support a mobilisation process and broaden the scope of political action (Llanes Salazar 2019; Dietz 2017), others highlight the (possible) reproduction of conflict dynamics, the impossibility of addressing structural inequalities (Rodríguez Garavito 2011), and the obstacles to realising consultations (Flemmer/Schilling-Vacaflor 2015). For Mexico, studies support this complex picture (Zaremberg et al. 2018). Yet, the implementation of consultation or other participatory mechanisms mostly happens after the first decisions on investment and siting are taken, thus shaping the conditions for a possible refusal – although, for instance in Ecuador, there have been cases when extractive projects have been stopped (see Vela-Almeida/Torres 2021). Additionally, a discourse on the necessity for the exploitation or raw materials and construction of infrastructure for the energy transition tends to focus debates on the 'how-to' and not the 'if', thus silencing critique (Backhouse/Lehmann 2019).

The possibility of voicing critique and participating in decision-making concerning extractive and energy projects tends to be exclusive and linked to repression. Studies on mining projects in Mexico tell us that company staff, together with municipal police and local elites in favor of mining activities, intimidate critics and different positions vis-à-vis mines, and that their possible impacts divide communities (Tetreault 2020). Extractive industrial activities as well as so-called developmental projects have a history of violent and deadly conflicts, with blurred lines between the power of local leaders, the so-called *caciques*, and violent actors of organised criminal groups as well as state officials (Jenss 2016). The same applies to renewable energy projects. Large hydropower dams in Mexico have a history of being linked to a 'development' strategy for electrification and irrigation, as well as a record of conflict, contestation concerning the

impacts for communities in and around the area-to-be-flooded (Sabás Vargas 2012), and violence, thus recalling what studies term a zone sacrificed in the name of 'development' (Del Bene et al. 2018).

4. 'Just transition' in Mexico and Ecuador? Discussion and outlook

Contextualising and scrutinising the ongoing energy transition is a necessary step in the direction of understanding how a transition can be termed 'just' in the sense of frameworks of energy, climate, and environmental justice. In the short term, truncated, incomplete, and controversial transition policies in the Global North as well as the current energy crisis in Europe might push Global Southern countries such as Mexico and Ecuador to deplete fossil fuel deposits, e.g. in the Ecuadorian Amazon region or the highlands of Southern Mexico. Furthermore, the development of e-technologies requires increasing amounts of metals and minerals; the geographical concentration of mineral deposits as well as volatile and currently rising prices remind us of the infamous case of fossil fuel extractivism. In the long term, green hydrogen production facilities will necessitate (currently inhabited) land for large-scale wind and solar farms, and unique conditions such as proximity to water sources and natural conditions (wind speed, solar radiation). Hence, green hydrogen, possibly destined for export to the Global North exclusively, might foster existing rentier dynamics or generate other types of rentierism, such as land and water rentierism.

We are tempted to see the reproduction of structural dependencies in the Global South as triggered by the current climate change-driven stage of capitalism, since rent generated by boosted mineral extractivism and possible green hydrogen exports does not escape the traditional logic of exporting raw material and energy resources to the world economy. Hence, the region's historical position in the international division of nature remains untouched. In the process, vast territories of the Global South (might) turn into rentier societies or new sacrifice zones for the sake of the energy transition. Thereby, the region's dependence on transition technologies and e-technologies will increase – despite attempts of Mexico to

develop renewable technologies in the country itself. Further, socioecological conflicts will be reconfigured, as protest movements both against reloaded extractivism and large-scale renewable energy projects reveal the reproduction of socioecological inequalities related to the distribution of costs and benefits. Protest in the context of socioecological conflicts reminds us of a broader critique of the natural resource-driven development model.

Whereas we emphasise that subsidies on 'cheap oil' products and protest movements against (green) extractivism are crucial to visualise the conditions and contradictions of the ongoing energy transition, we also highlight the role of the peripheral state during the current juncture. Albeit with differences, the national state is an arena where policies are and could be negotiated, in which the discourse on national development condensates. Nevertheless, the state-led natural resource-driven development model encounters progressively more opposition rooted in the increasing awareness of the negative socioecological consequences of (reloaded) extractivism. Yet, a 'just transition' would be contrary to rising energy prizes for the people in Mexico and Ecuador. Subsidised oil products for the satisfaction of basic needs such as transportation and cooking have cemented the idea that access to cheap energy services is a quasi-naturalised right in natural resource-rich countries – and a contradiction to the need to decarbonise; hence, it is central to rationalizing an emerging contradiction between the pursuit of 'national development' in peripheral societies and the quest for 'globalized sustainability' – and to develop policies that address energy poverty and support low-income households while preventing the use of fossil energy resources.

The question of how the transition can be financed in Mexico and Ecuador remains open. Well aware that the primary sector of the economy is essential to economic development, governments in both Ecuador and Mexico seem to be trying to manage the balancing act of attracting foreign capital while retaining the state's grip on the energy sector. On the one hand, powerful hydrocarbon sectors are traditionally state-controlled and the strengthening of state-owned oil companies is often accompanied by a nationalist discourse touting them as motors of modernisation. Mining activities are regarded as the realm of the private sector; here, national states understand their roles as facilitators of legal frameworks, and state's

support of mining companies often ends up relaxing environmental and labour regulations to attract foreign investment. On the other hand, despite Mexico possibly having an advantage in attracting foreign direct investment because of its large manufacturing sector, the corruption perceptions index of 31 (Transparency International, 2023) might become a hindrance[6]. Most natural resource-rich Global Southern countries face high borrowing costs that hinge on the country risk, which, in turn, depends mainly on internal conditions such as political stability. Since renewable energy infrastructure is often more capital-intensive than conventional power plants, snowballing external debt might be among the consequences of the pursuit of the energy transition in Mexico and Ecuador.Another open issue is the state's participation in the e-technology value chain. Whereas in the question of the state's natural resource rent appropriation, state-owned companies (in the oil sector) and taxation and royalties (in the mining sector) are essential, neither Mexico nor Ecuador has developed a consistent strategy regarding processing critical minerals before exportation. The same applies to the role of the state in international partnerships on the development of green hydrogen facilities. Yet, it would be misleading to bet only on the state's role. Whether the transition is going to be 'just' depends on social forces that contest current socioecological inequalities and the possible reproduction of conflicts and rentier dynamics related to attempts at energy transitions. Here, social mobilisation against lithium, copper or silver mining is equally as important as mobilisation for implementing laws on value chains or agreements such as the Escazú-Agreement, which emphasises the rights of affected neighbouring communities to participate in decision-making on extractive and energy projects.

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2 See www.camimex.org.mx, 6.10.2023.

3 See www.britannica.com/place/Mexico/Trade, 6.10.2023.

4 For an overview see EJAtlas: https://blogs.ciencia.unam.mx/cienciamundo/2017/05/16/un-atlas-mundial-de-conflictos-socio-ambientales/, 6.10.2023.

5 See https://globalpressjournal.com/americas/mexico/hydrocarbon-exploration-threatens-indigenous-land-protesters-respond-art/, 6.10.2023.

6 According to Transparency International (2022: 4), the corruption perceptions index scores 180 countries and territories by their perceived levels of public sector corruption, according to experts and business people. The world's average score is 43 (where 100 is very clean and 0 is highly corrupt).

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Abstract *Der Begriff ‚just transition' hat historisch gesehen seinen Ausgangspunkt in den Sorgen und Forderungen von Arbeiter:innen ‚schmutziger Industrien' des Globalen Nordens im Hinblick auf Umweltvorschriften und (mögliche) Auswirkungen auf ihre Arbeitsbedingungen und Arbeitsplätze. Zunehmend wird das Konzept verwendet, um auf soziale Gerechtigkeit beim Übergang zu einer kohlenstoffarmen Wirtschaft auf der Grundlage erneuerbarer Energiequellen hinzuweisen. Vor dem Hintergrund eines durch Klimawandel und Klimawandelpolitiken gekennzeichneten globalen Kapitalismus zeigen wir die Spannungen auf, die zwischen den Begriffen ‚nationale Entwicklung', ‚globale Nachhaltigkeit' und ‚just transition' entsteht, und argumentieren, dass die derzeitigen Transitionspolitiken und -pfade dazu tendieren, extraktivistische und rentieristische Logiken sowie sozialökologische Konflikte im Globalen Süden zu (re-)produzieren. Empirisch fokussieren wir auf die politische Ökonomie und politische Ökologie des heutigen Mexiko und Ecuador und zeigen Gefahren von Transitionspfaden auf, die eine ‚gerechte' Transition begrenzen.*

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