Latin American Perspectives on Global Development

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Edited by

Mahmoud Masaeli, Germán Bula
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This book first published 2018

Cambridge Scholars Publishing

Lady Stephenson Library, Newcastle upon Tyne, NE6 2PA, UK

British Library Cataloguing in Publication Data
A catalogue record for this book is available from the British Library

ISBN (10): 1-5275-1387-4
ISBN (13): 978-1-5275-1387-7

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CHAPTER ONE

LATIN AMERICAN ALTERNATIVES ON GLOBAL DEVELOPMENT: NOTES FOR READERS

MAHMOUD MASAELI
PRESIDENT AND CEO OF ALTERNATIVE PERSPECTIVES AND GLOBAL CONCERNS - APGC
GERMAN BULA
UNIVERSIDAD DE LASALLE, COLOMBIA
SAMUEL ERNEST HARRINGTON
UK REPRESENTATIVE, APGC

An Overview of the Context

Within Latin America, there is some debate as to the exact meaning of the term "Latin America", and whether an alternative term, such as "*Hispano-America*" or "*Ibero-America*" is more appropriate. The term "Latin America" is meant to denote the parts of the new continent that were colonized by European powers that spoke a language descended from Latin. This allows us to speak of México, Brazil and Haiti as parts of the same geopolitical, historical or cultural group of nations, but it has the curious consequence of including the Quebecois. "*Hispano-America*" would denote only the countries which were colonized by Spain, whereas "*Ibero-America*" would also include Brazil. The World Bank (among other organizations) treats "Latin America and the Caribbean" as a single region, which includes the English-speaking Antilles, such as Jamaica, as well as non-Latin mainland colonies like Belize. However, the story of these nations is markedly different and features much stronger ties to European colonial powers. The purpose of this book is to showcase ideas and experiences from a certain part of the world that are worth exploring in order to rethink the conceptual framework and strategies for

development. What is common to the region, and relevant to this endeavour, is that the countries in question share a common history of struggle for economic, political and cultural independence, both from European colonial powers and from the United States. This struggle to gain control of the destiny of one's own nation amply transcends armed or political conflict. There is a struggle of the mind to free oneself from the shackles of hegemonic thinking, of a perceived and inculcated sense of cultural and racial inferiority, of coming to terms with the condition of being *mestizo* and standing astride European and native traditions, of the temptation to give up on the cause of the oppressed by collaborating with the oppressors. The ideas presented in this book emerge from that conflict. When we speak of Latin America, we mean that region of the world that has been shaped culturally by a particular history of resistance.

During the colonial period, Latin America, hampered by a Catholic orthodoxy, aligned with an absolutist perspective and a scholastic and deductive mode of education and reasoning. It did not fully participate in the modernization process of the seventeenth and eighteenth centuries. Things began to change in the nineteenth century. The American Revolution and the spreading of the ideals of liberty, democracy and religious tolerance, as well as a rising wave of nationalism, gradually penetrated the sub-continent and caused the old structures to crumble as Latin America appropriated the discourses of the Enlightenment and combined them with the historical memory of indigenous struggle against colonizatio. The prolonged struggle against colonialism has caused the people of Latin America to view their subcontinent as the cradle of liberation from both colonial exploitation and the colonization of the mind of its people (these processes have continued to the present day in the struggle against neoliberal exploitation and its concomitant ideological apparatus). Heroes such as Simón Bolívar, Bernardo O'Higgins or Francisco de Paula Santander, just to name a few, helped forge the political independence of the subcontinent. Philosophical independence was pioneered by thinkers such as Miguel Hidalgo, José María Morelos or José Martí. These thinkers inaugurated a tradition of native Latin American thought centred on emancipation. Thinkers such as Arturo Andrés Roig or Enrique Dussel are inheritors of this tradition, and have helped develop a unique Latin American philosophy of life, which has provided the basis for a profound critique of hegemonical discourses of development in the works of authors such as Arturo Escobar, Anibal Quijano, Gustavo Esteva, and Boaventura de Sousa Santos.

Independence from colonial powers was not the end, but the beginning of the Latin American struggle for self-rule. In the post-independence period, the old structures remained intact. a new form of mercantilism was consolidated around export-oriented economies controlled by despotic oligarchies. Although there was a period of economic growth in the nineteenth century (with the appearance of infrastructure, banks, investments and a growing population), it did not cause development because the ruling classes were interested in keeping the countries in conditions of dependency.

Following the 1929 stock market crash, Latin American countries were faced with profound challenges as their export-heavy economies faced a sharp and unprecedented drop in value. The gap between the fallen value of exports and the rising costs of imports destabilized the terms of trade against Latin American countries. Such a tailspin in trade, in turn, decreased the amount of foreign investment needed to stimulate steady economic growth. At the same time, domestic sectors, including mining and agriculture, faced declining efficacy from the Caribbean sugar industry to Chilean copper and tin extraction. Many of the countries, encountering decline in revenue, were also challenged by budget deficits and a failure to pay their debts.

Political unrest against ineffective and corrupt governments in many Latin American countries led to military coups and nationalistic governments. With the slogan “Brazil for Brazilians”, Gétulio Vargas created a new constitution, a strong welfare state, a tight trade relationship with Germany and an economic model based on the German conservative model of fast industrial growth. At the time, the political landscape in Argentina was marked by a contradiction between the landed oligarchy and industrialist players. With the unrest caused by the Great Depression, public opinion turned against the former: having been blamed for the mismanagement of the economy and an alliance with the former Soviet Union, President Hipólito Irigoyen was overthrown in a *coup* by General José Uriburu in 1930. Around the same time, President Hernando Siles was overthrown in Bolivia. In 1931, a general strike in Chile forced President Carlos Ibañez to resign and go into exile; subsequent turmoil in 1932 caused a series of coups and guerrilla movements until the end of the 1930s. Central America and Caribbean countries also experienced changes, including the 1933 military coup in Cuba, which put Fulgencio Batista in power. Venezuela was an exception in that Juan Vicente Gomez was able to hold on to power until his death in 1935 because oil revenues kept the economy relatively stable.

In this period, and up until the 1960s, the policy of Import Substitution Industrialization (ISI) was adopted throughout the subcontinent, boosting industrialization (while political and social development were totally ignored). The aim was to replace foreign imports with domestic production, relying on domestic markets for economic strength. Reducing the reliance on international markets was meant to increase independence from foreign shocks, decrease dependency on imported manufactured goods from the industrialized West, create jobs, and, ultimately, stabilize economies. However, this strategy was costly. Not only did ISI require strong state intervention (which led to corrupt clientelist governments), it also caused the emergence of new capitalist classes which were not interested in national prosperity. At the same time, the absence of socio-political development in the process of rapid, nationalist industrialization produced conditions conducive to populism. Although such a process fortified the position of industrialists against the landed forces, populist movements were utilized to further the interests of the clientelist states of, for example, Peron in Argentina and Vargas in Brazil. The longevity of the model was dependent on the authoritarian state and charismatic leadership appealing to the class interests of the industrialists and the workers.

Nationalist parties adopting ISI could not boost the economic development of Latin America for several reasons. The rapid industrialization stimulated by ISI was limited to certain sectors of the economy, and independence was not achieved because there remained a need for substantive importation for the production of finished goods, so that nascent industries remained tethered to fluctuations in the prices of import goods. Although a degree of development was experienced, ISI could not cut its dependency on the industrialized countries of the West which were still able to control the international political economy. In addition, the declining terms of trade for raw materials caused more complicated issues for the Post-Depression states for the payment of scheduled loans. Inter-regional trade was itself a trap since the countries involved were all pursuing the same goal of industrializing themselves through protectionist policies. The consequence of 30 years of ISI was unexpected. Domestic markets could not grow, unemployment continued, the autocratic nature of the interventionist state weakened the economy, the labourer remained still under the control of influential forces, and a dependency on the international economy was barely masked.

The most severe struggle for independence and proper development started in the 1960s. This struggle manifested in dependency theory which extends its roots back to the Prebisch-Singer hypothesis. This hypothesis

states that, over time, the price of primary commodities declines relative to the price of manufactured goods, and therefore the terms of trade for primary economies (such as those in Latin America) tend to deteriorate, causing unbalanced development in the world. From its modern inception in the 16th century, the world economy has been structured around the ability of western countries to manipulate the markets; industrialized and processed goods are relatively costly, while raw materials from developing countries are relatively cheap. As President of the Central Bank of Argentina, and later as the influential Director of the United Nations Commission for Latin America, Raul Prebisch held that unfair international trade conditions were the cause of dependency and underdevelopment. Under such conditions, as long as the chain of dependency on international trade exists, developing economies cannot grow. The solution appeared quite straightforward: lessen dependency to produce the possibility of growth.

Although the initial dependency theory of Singer-Prebisch was liberal in its nature, it attracted attention and praise from Marxist-Leninist theorists of imperialism, as well as of the later neo-Marxists. In *The Political Economy of Growth*, Paul Baran, among others, deepened the argument and urged a revolutionary response to dependency. Latin American and Caribbean contributors to dependency theory including Theotonio Dos Santos, Fernando Henrique Cardoso, Pablo González Casanova, Ruy Mauro Marini, Walter Rodney, and Eduardo Galeano further elaborated the necessity of delinking Latin America from the West. Andre Gunder Frank authored a brilliant work in dependency theory entitled *Capitalism and Underdevelopment in Latin America*; it highlighted the "development of underdevelopment" by the metropolis. Underdevelopment is structural and systemic because the international political economy from the 16th century onwards has been constructed around the dependency of the peripheries to the metropolis. In fact, dependency, as Theotonio Dos Santos puts it, is "an historical condition which shapes a certain structure of the world economy such that it favours some countries to the detriment of others and limits the development possibilities of the subordinate economies" (Dos Santos, 1971, p. 226). Underdevelopment is the result of the historical relationship of Latin America to the international system. This relationship must be broken down.

Vincent Ferraro, who is one of the main figures in dependency theory, proposed a distinction between *undevelopment* and *underdevelopment*. The former may be caused by the absence of the proper use of resources. The latter, by contrast, refers to the condition in which the economic growth of a country has been impeded. Underdevelopment refers to a

situation in which resources are being actively used, but used in a way which benefits dominant states and not the poorer states in which the resources are found (Ferraro, 2008). These countries have been left behind in terms of scientific progress, as a consequence of having been coercively integrated into the economic system only as producers of raw materials and labourers. As a matter of policy articulation, then, underdeveloped countries cannot grow by adopting the West as a model. Nor can they properly develop themselves using capital accumulation, export-import policies, and/or the market economy. Economic growth must not be confused with economic development. The latter, Ferraro explains, involves a greater attention to indices such as life expectancy, literacy, infant mortality and education. Underdeveloped countries, to attain economic growth, must set forth policies that increase their self-reliance, enabling them to control interactions in the international political economy.

The failure of nationalist authoritarian models of economic development also resulted in the emergence of liberation theology in the middle of the 20th century. Widespread inequality and poverty encouraged a group of dissatisfied clergymen and working-class thinkers and activists to rethink religion and decouple it from the elites-based structure of European Catholicism in order to further social justice. To attain this goal, substantive reforms had to take place in the structure of the church, as well as a shift in focus towards the oppressed social classes. In 1968, a number of Latin American clergymen gathered in Medellin, Colombia, to announce the support of the oppressed by their church. Hélder Pessoa Câmara, the archbishop of Olinda and Recife in Northeast Brazil and a great advocate of human rights and socio-economic justice, frankly criticized the military dictatorship's backing of privileged groups and the maintenance of wealth at the expense of the misery of their countrymen. Câmara, who quickly became an icon of liberation theology, refused to live in the traditional episcopal palace near the cathedral, and instead used the palace as a shelter for poor people. His prophetic voice and actions, his teachings on structural injustice and the liberating role of education (Câmara, 1974), were dangerous for the privileged groups who labelled him "the red bishop" (Rocha, 2000, p. 34).

Standing on the side of the poor, Peruvian priest and theologian Gustavo Gutiérrez rose out of the Catholic Action Movement in Peru. The movement aimed at linking the church to the poor and for this purpose undertook a mission of political action. He sought an alternative to Christianity that would be able to understand the structural causes of poverty and promote social justice. In *On the Side of the Poor,* he argues

that the church must set forth a mission for justice. This mission means, first and foremost, that the church must give priority to the marginalized and to all of those whose rights have been denied. With a clear reference to Matthew 6:33 ("first seek his reign and his justice, and all other things will be given to you as well") (Gutiérrez, 2015), Gutiérrez undertook his mission for justice, a mission which was condemned by the Catholic church. In *A Theology of Liberation*, he interpreted this preference for the poor and marginalized as the church's mission before God. Deviation from this responsibility for justice is impossible from the perspective of liberation theology because we meet the Lord in our encounter with creatures. Indeed, what is done for others is done for the Lord (Gutiérrez, 1973).

By making explicit the structural causes of marginalization and oppression, and appealing to justice before the Lord, liberation theology presented a philosophy of liberation in both the political and economic spheres, as well as a new, non-elitist, vision of Christianity. At the centre of this interpretation, there is a presence of the divine within the social context. Catholic liberation theology produced inspiring works in the hands of authors such as Leonardo Boff of Brazil, Juan Luis Segundo of Uruguay and Camilo Torres (who helped introduce sociology to Colombian academia and later joined a left-wing guerrilla group as a foot soldier). Liberation theology also transformed protestant theology in Latin America in authors such as Rubem Alves, José Míguez Bonino, and Elsa Tamez. Evangelical churches also adopted the mission of social responsibility under such leaders as René Padilla of Ecuador, Samuel Escobar of Peru, and Orlando E. Costas of Puerto Rico.

During the 1970s and 1980s, a number of prominent leaders of liberation theology were assassinated. Brutal right-wing dictatorships gained power throughout Latin America (Chapter 4) and Keynesian economics was abandoned throughout the world in favour of the neo-classical economics championed by Milton Friedman and Friedrich Hayek. The aftermath of the 1973 military *coup* that overthrew socialist Salvador Allende and put Augusto Pinochet (whose government received advice from Friedman and his Chilean students) in power oversaw the murders of scores of left-wing religious leaders such as Joan Alsina, Gerardo Poblete and Miguel Woodward. Many religious activists were also murdered after the 1976 military *coup* in Argentina which toppled the populist government of María Estela Martínez de Perón. Among them, the bishop Enrique Angelelli, as well as three priests and two seminary students in what is known as the Mascre de los Curas Palotinos, which was perpetrated

directly by the military. The archbishop of San Salvador Oscar Romero was murdered on March 24, 1980; in May of the same year, the presidential campaign of Ronald Reagan produced a position paper which explicitly advocated combating liberation theology as a foreign policy goal for the US. 1986 saw the murder of Josimo Morais Tavares, a Brazilian priest involved in issues of land reform and 1989 was the year of the UCA massacre. In the UCA massacre, a military battalion entered the Central American University of El Salvador and murdered six Jesuit priests and two university employees. Among the dead was the philosopher Ignacio Ellacuría and the psychologist Ignacio Martín-Baró, who had made innovative contributions to community psychology and political psychology, as well as liberation theology.

As neoliberalism waxed and liberation theology waned through persecution and a lack of official support on the part of the Vatican, a new movement emerged in the sub-continent: post-development scholarship (chapter 15). The reasons for the emergence of this movement are to be found in the practical failure of previous approaches in producing a satisfactory order for Latin America. This failure includes modernization theory, Marxism, dependency theory and the World System Theory (a systemic approach to development and economics which looks at the whole world-system, developed in the 1970s by Immanuel Wallerstein). Post-structuralism, by criticizing the inherent contradictions at the centre of modernization and the universalist promise of human emancipation, deeply influenced post-development perspectives. Imperative in the emergence of the post-development perspective is an emphasis on the assumption that power dynamics form the essence of the Western-based view of economic growth which has been detrimental to developing countries. Therefore, theories of development proposed by the West are not neutral. Instead, they are associated with the application of a power dynamic that shapes our imagination and cognitive capacity for directing our wellbeing. In other words, a new struggle formed in Latin America (and also in Africa and Asia), that searched for a practical and enlightened endogenous methodology for the development of the underdeveloped countries.

In presenting a rooted account of selfhood, José Ortega y Gasset explained that an ontological distinction must be made between being and authentic being. The latter reflects a sense and articulation of how people interact with one another in the social world. This continuity of interaction gives us an understanding of ourselves wherein I am “me and my circumstances” (2000, p. 47). Accordingly, to know who we are and how we may portray

our philosophy of wellbeing, we must understand the circumstances affecting our understanding, then design a project that will improve our lives. This attitude of action being preceded by self-knowledge in order to be authentic is characteristic of post-development scholarship. It is obvious that the prevalent view of development ignored the circumstances affecting the living conditions of the people of developing countries. If modernization and the theory of economic growth promise universal wellbeing, why is the world suffering from inequality, impoverishment, and the marginalization of a clear majority of people in developing countries? The scholars of the post-development turn best articulated the answer. The theory of economic growth propounded by the West is a means of control and hegemony because it is associated with power relations. Indeed, the western discourse of growth is a colonial representation replete with inherent contradictions. Proclamation of neutrality, scientific specification, and the universalization of the theory of growth is in practice an instrument of hegemony and a colonization of mind. Accordingly, underdevelopment has not been caused by the intellectual or cultural impoverishment of the people of underdeveloped countries. Rather, underdevelopment has been constructed and must be properly conceived as the extension of hegemonic policies by the imperialist West.

Such thought-provoking scholarship was introduced by Gustavo Esteva of Mexico, Arturo Escobar of Colombia, Anibal Quijano of Peru, Majid Rahnema of Iran, Mahmoud Mamdani of Uganda, and Walter Mignolo of Italy, among others, with Latin American scholars as leading voices. By looking back at a time when the idea of international development was first conceived, Esteva brilliantly established the core assumptions of post-development. The idea of development is hegemonic; therefore, it reflects a given historical context that sets the parameters of how we think. The United States, in conjunction with financial institutions such as the World Bank, have moved hand in hand to extend a hegemonic discourse of development in the post-World War II era, in which Western powers decided to handle the underdeveloped world as interventionist managers. With the advent of global development, underdeveloped countries “were placed in the undignified position of those who have started on the road that the others know better, a way towards a goal that others have reached, a one-way street”. (Esteva, 2013, p. 121). Esteva encourages us to ask about the meaning of development; like Ortega’s authentic self, underdeveloped countries must take stock of their circumstances in order to formulate an authentic form of development. To develop authentically, countries in the global south must break away from the existing system

that produces underdevelopment: “if you want to create a radically new thing, to learn whatever you want to learn beyond the system, you can create that tomorrow morning. You can immediately create something else, a different kind of situation” (Esteva, 2005).

Arturo Escobar, the most well-known figure in the post-development movement, further illustrates the purposeful nature of the developed/undeveloped labeling. Like Esteva’s analysis, in *Encountering Development*, Escobar traces the historical roots of the hegemonic approach to development in the political rearrangement of the world that occurred after World War II. The notions of “underdevelopment” and “Third World” were the discursive products of the post-World War context. These terms emerged as the working principles within the process by which the West redefined itself and the rest of the world (Escobar, 2001, p. 31). Such redefinition gave birth to a new structure of power which resulted in a gamut of ills and evils, including environmental destruction, the dehumanizing experience of development for much of the world’s population, excessive consumption, the continual reproduction of neo-imperialism and neo-capitalism, and patriarchal structures of domination and exploitation. According to Escobar, Latin America must initiate its own alternative process of development, embracing the experiments of peoples living on the margins. For this purpose, Latin America must rely on a dialogue with grassroots movements to create a research agenda to conduct ethnographies of these movements. Among the measures adopted, the priority must be given to downscaling or de-growth policies, with attention paid to cultural diversity, participatory democracy, and voluntary simplicity. Priorities must be given to traditional medicine, local knowledge, local agriculture, an ecological economy, and understanding the dark side of development.

Participatory Action Research is key for the realization of this alternative view of development (chapter 16). Such action requires the active participation of the community in research oriented towards social change. Community participants work with a facilitator to identify a community problem, develop a research methodology, collect data, and analyze findings. The data is then used to make recommendations about how the problem should be resolved. Participants advocate for funding, legislation, or government action to adopt the findings. The result would be the alleviation of oppression and the improvement of practices that affect the community. This research plan increases feelings of belonging in the community and thus the likelihood that the resulting program or intervention will meet the needs of the stakeholders and be culturally

appropriate, while participants develop skills and confidence. They gain knowledge and information and are therefore empowered in setting their own course of development.

The history of the struggle for development, leading to dependency theories (including the variants of the World Systems Theory), liberation theology and ultimately the post-development scholars alternative accounts of human wellbeing, portray a rich picture of Latin America's attempts to achieve development. Not only did Latin American countries produce new theories and approaches to development, they were willing to experiment with theoretically bold approaches to social organization. This courageousness was evident in Chile, where Salvador Allende commissioned and had begun to implement, a design for a planned economy based on the principles of cybernetics, at the hands of Stafford Beer (chapter 13). However, there are still dimensions to explore. Latin America has the potential to present new and innovative accounts of development that take concrete human well-being into account (chapter 10). To flesh out what fresh views on development Latin America can provide, we must look at the subcontinent's general philosophy of life, manifested in its philosophy, literature and arts.

Latin America must not be conceived as a mere locus of intervention or as the "backyard" of the United States. Neither must the genuine potential of the subcontinent for development be restricted to dependency theory, liberation theology or post-development perspectives. Latin America was one of the centres of culture, civilization, creativity, and human development in the pre-colonial era, and in colonial times; and still is today. The powerful cultural heritage of the indigenous inhabitants of the subcontinent is not lost to modern Latin American culture. The subcontinent is a valuable store of ancient wisdom that may be put to use to correct the errors of Western civilization's relationship with nature, made evident in our current environmental crisis (Davis, 2009; chapter 7). Latin America is undergoing a diverse cultural, philosophical, and spiritual development with a great potential to be aligned with, and contribute to, the contemporary debates surrounding the ethics of global development.

Latin America has produced seven Nobel Prize laureates in literature, including Gabriel García Marquez, Pablo Neruda, Octavio Paz, and Mario Vargas Llosa, all of whom have shown the depth of Latin America as a cradle of human culture. This cultural production is not divorced from the struggle towards autonomy; rather, literary production in Latin America has consistently reflected it, portrayed it through an aesthetic lens, and has

even been a vehicle for denouncing imperialist crimes (see chapter 3). Popular musicians such as Julieta Venegas, Silvio Rodríguez or Chico Buarque are also a testament to the vast cultural heritage of Latin America, and the politically engaged and historically aware nature of its cultural production; which continues to produce new and surprising music and forms of collaboration (chapter 19).

This book aims to provide a richly contextualized vision of Latin American ideas that are relevant to debates on development. Part I, Oppression and Resistance, presents a common thread and context for understanding Latin American culture as an exercise in identity formation and creative resistance to colonial oppression. It achieves this aim through an examination of nation-building discourses (chapter 2), literature that denounces the excesses of multinationals that operate as colonial powers (chapter 3), and a discussion of political struggle against both the local authoritarian governments that collaborate with global imperialism and the efforts to erase their excesses from history (chapters 4), specially on the part of womens organizations (chapter 5). The chapter closes with a philosophical reflection on the nature of the colonized subject (chapter 6)

Part II, Latin American Philosophy of Life: Alternative Perspectives on Wellbeing, gives an overview of Latin American identity (chapter 7) and its outlook on life. It explores the indigenous cultural heritage of Latin America as it relates to the present culture and the environmental crisis, as well as the aesthetic and political movements that creatively respond to a way of life that is no longer viable (chapters 8 and 9). This part closes with a curious and perhaps illuminating puzzle; although living conditions in Latin America are less than optimal, in many ways, consistent statistical data indicates that they are happy (chapter 10). What is it about the Latin American outlook or way of life that can produce happiness, even under conditions of political hardship, using relatively few natural resources? A possible partial answer is offered in chapter 11: the structure of Latin American cities.

Part III, Latin American Alternatives for Development, showcases some of the ideas and experiments that have been developed in Latin America that may provide new paths to understanding and managing societies and their economies. This model could operate not only in the subcontinent but across the world as a whole. Chapter 12 is concerned with Latin American efforts to address regional integration, perhaps a precondition for autonomous development. Chapters 13 and 14 discuss some of Latin America's contributions to systems thinking, its implications for understanding society,

and the aborted experiment in managing a nationalized economy using Stafford Beer's systemic model of cybernetician in Salvador Allende's Chile. Chapters 15 and 16 discuss post-development scholarship in Latin America and its accompanying methodology, participatory action research.

Part IV collects five case studies that round out a vision of Latin America's outlook and promise. Chapter 17 discusses the strategies and community basis for the non-violent resistance techniques of the Nasa Indians of Southern Colombia, caught in a multi-sided civil conflict. Chapter 18 discusses the vision of health of the Miskitu peoples of Central America. Chapter 19 discusses new forms of music and artistic collaboration among Latin American musicians. Chapter 20 discusses the experience of Colombian and Latin American women's activist groups facing state violence. Chapter 21 closes the book with a study of young Latin American attitudes towards politics and the future.

There are many promising ideas and features of the Latin American outlook that are not collected in this book. However, we believe that it makes an ample case for looking at Latin America as one of the regions of the world from which a healthier, happier and saner vision of development may be constructed.

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PART I:

OPPRESSION AND RESISTANCE

CHAPTER TWO

DISCOURSE OF INDEPENDENCE: LATIN AMERICAN ENLIGHTENMENT AND INDIGENISM

MYRIAM A. ZAPATA JIMÉNEZ
IVÁN RAMÓN RODRÍGUEZ BENAVIDES
UNIVERSIDAD DE LASALLE, COLOMBIA

Executive Summary

Speech and text commonly find themselves traversed by social, political, and cultural dynamics, as are the actors involved in them. In the context of the Enlightenment, these refer mainly to the French ideas of liberty, autonomy, equality and the emancipation of the spirit that were imposed on Latin America. As Immanuel Wallerstein (1996) points out, with the notion of a world system, social sciences as an endeavour of the modern world held an important role in individuals' construction of identity. In this sense, the invention of an 'other' that differs from the European fills a taxonomical role that imposes a scale upon human beings: better and worse, civilized and barbaric, and so on. This scale explains how during the practices and discourses of Spanish colonisation, Indians and black people would not even reach a human category. Models of subjugation, slavery, discrimination, and exclusion generated this disdain, hate, and lack of acknowledgement for other human beings. Discourse against these practices emerged in liberation speeches that, in the case of Latin America, have Simon Bolivar as their main representative. In this paper, enlightened speeches given by Bolivar's mentor Simon Rodriguez will be approached and linked to the philosophers of the European Enlightenment and their impact on Latin America. For this reason, the three most representative texts of Bolivar's political thought will be discussed in which we can observe the influence of the philosophy of the Enlightenment on South America.

Keywords: Independence speech, Latin American, Enlightenment, Simon Bolivar.

1. Introduction: Enlightened Speech and the Being of Enlightenment

According to the Enlightenment, which considered reason to be central in moving away from the dark ages, education took care of ensuring certain values. From a homogenising perspective, however, the Enlightenment centred more on the way things should be rather than on how they are. This focus explains why ethnic and racial identities were never incorporated into the Enlightenment worldview. As Castro-Gomez points out, "*they never taught [them] how to be a good farmer, black or indigenous.*" Then, the autonomy that was gained by separating the State from religion was jeopardised by the institutions' and the State's control devices. These devices instrumentalised education, creating a gendarme of science and technology.

Accordingly, the proclaimed emancipation of modern human beings, their autonomy and responsibility towards others, ensured that being self-regulated would have a restrictive character. This paradox demonstrates why emancipatory and so-called 'enlightened' speeches were not homogenous and predominated mainly in conservative thought, denying equality and fraternity. Given that the indigenous population and farmers represented an earlier, 'non-enlightened' time, we can determine from the official speeches linguistic, educative and cultural programs that were imposed on this population to integrate them into the wider, 'enlightened' society. This integration took place in almost every country in Latin America.

Since colonial times, indigenous identity has been ravaged by epistemes, practices, and political, literary, and anthropological speech, so much so that this community was left subsumed by the regulative ideal of education that intended to transform them, in the best possible case, into citizens. Yvinec (2013), referring to Peruvian indigenous communities, analyses some practices of concealment:

> Very relevant are the relationships of celebrations, especially in the official press, from Lima and Providencia: in these relationships of traditional parties, associated with a colonial past that must disappear (bullfights, certain religious celebrations), he always mentions the indigenous, while in relationships of civic celebrations, associated with the Republican present,

> no mention of the "Indian" is made, but rather of the "people"- making clear the presence of the indigenous in said "people" when it comes to the Andine regions. (p. 289)

The same author points out that the speeches in the press discredit indigenous people. For example, they say that indigenous people "vote wrong," and when facing the abolition of tax that "they do not work unless forced to." On the other hand, he presents the thesis that *other than the difference between theory and practice, there was also much opposition to an official speech about the indigenous populace:*

> The legislation was diverting. The pretext was, for example, some "necessity," prefects used to require that the indigenous work as guides for horsemen and cattle, while it was adamantly forbidden. We have even found anti-constitutional and illegal departmental decrees, like that of the Puno prefect of 1846 that decided to re-establish forced labour by the indigenous. (p. 289)

In authors such as Bartolome de las Casas or Ginés de Sepulveda, black and indigenous people are referred to as subhuman. On this scale, women are described morally and sexually, when not referring to witchcraft and magic. These expressions and speeches made possible the civilising endeavour of the colony, focusing on what they thought 'should be' rather than on what is.

Contrary to these speeches and representations, we find authors like Alfonso Reyes (1519). In *Vision of Anahuac*, he recovers the identities of the conqueror and the Indian, who, fascinated by the discovery, develop their own spatial, temporal and cultural dimensions.

Reyes praises that which derives from the indigenous, not as a heroic essence that should be imposed, but rather as a ferment open to the mix. Reyes compliments the hybridity, the indigenous root that is enriched by the assumption of other influences. Hispanic and Western influences do not represent an invariable model but rather a broad tradition, open to discernment and reinvention. Certainly, as he will suggest years later, in the hurry of "discovering the Mediterranean on his own", he finds this strength of "American intelligence." Reyes' work, energetic and eloquent, establishes unpopular historical theses of the time with subtlety (González T, 2 párr).

Along the same line, Brother Bernardino of Sahagún's wondrous *General History of Things in New Spain* (1540-1585) is formed by three languages: Latin, Nahuatl, and Spanish. He transcribes stories obtained via interviews

with indigenous people of the Valley of México about their customs and culture. The interesting thing in the text is the illustrations that led to the name Códice Florentino. These are a few valuable examples in which we can rescue and evaluate not just the work of the authors, but also the voice of the indigenous there represented.

We cannot deny how indigenous individuals become present in an active, and persistent way, as renegades seeking cultural autonomy. Through the undertaking of a political position in diverse moments and phases, indigenous individuals also expressed themselves in art, literature and painting. Huaman Poma de Ayala, for example, an indigenous, Peruvian lawyer, who, in his *First New Chronicle and New Government* (1600-1615), develops a genealogical, graphic and literary treaty on the colonial domain and shows the way in which indigenous people make use of judicial mechanisms for the defense of their dignity. *The concern for the indigenous becomes truly evident towards the end of the 1860s, because of the rebellion of Huancane (1867-1868), the first significant, indigenous rebellion of the Republican era:*

> Juan Bustamante, a wealthy wool merchant and traveller, named representative of the Indians in Huacane, founded the Society friendly to the Indians which existed from 1867 to 1870, gathered the wide liberal elite both in Lima and Providencia. Thanks to the analysis of the press (opinion pieces and pamphlet novels still unknown to this date), it is shown that the Huancane rebellion reignited fear in the indigenous (simmering since the great rebellion of Tupac Amaru) and paradoxically unleashed their first defense movement. Because of the similarities with some later movements, it is suggested that it can be considered as proto-indigenism. (Yvinec, 2013, p. 287)

Ideas of liberty and equality, defended rigorously in the Enlightenment, were framing diverse social movements and organised indigenous rebellions, expressions and acts. Indigenous speeches sought to recover an indigenous way of being and integrate it into cultural topics as well as those of indigenous rights and resistance; they moved past the idyllic anthropological and literary vision of Indianism, developing a political stance. Due to kinship, ethnicity and those who have joined by taking on the culture as such, current indigenous collectives have managed to maintain, update and remain open to various vindications and cultures according to social, political, judicial and global dynamics. Social and political speeches, collective actions on cultural vindication or respect for the environment, as well as campaigns for ancestral, sexual and

reproductive rights, are part of the social and global demands of the diverse collectives within which ethnicities identify themselves today.

2. Simon Rodríguez, Ideas of Liberty and the Education of the Liberator

The educational ideals of the Enlightenment influenced the liberator Simon Bolivar. These ideals included reason and knowledge but also freedom, justice, and American autonomy and identity. This synthesis is because his mentor, Simon Rodriguez, was a teacher of Enlightenment philosophy and a Latin and Americanist at heart. Bolivar was essentially influenced by Rousseau, who advocated for freedom and autonomy, which became the pillars of the Bolivarian ideas that boosted the liberation campaign. We find the ideals of the Enlightenment in several of Simon Rodriguez' works. This paper will highlight some of the works directly influenced by Simon Bolivar, among them: *The Liberator of the Mediodia of America and his Fellow Comrades in Arms, Defended by a Friend of the Social Cause* (1830), *American Societies* (1828), *How They Will Be and How They Could Be in the Coming Centuries* (1840), and finally a book on education entitled *Lights and Social Virtues* (1831). Concerning the ideas of the Enlightenment, we will extract the following subjects and some of the ideas that are found mainly in *American Societies:*

1. **Moral autonomy:** Understood as the freedom and independence to act by one's will, with no external coercion: ***"The tree of freedom must be watered with blood"*** is a true concept if ***freedom*** is interpreted as ***independence to act in one's own favor, with no external coercion.*** It is a false concept and is necessary to dispute if it is understood as a form of acting, setting a principle that regulates this form: the result would then be a perpetual war and, as a consequence, annihilation (p. 62).
2. **Freedom of religion and spirit**: Rodriguez fought for the autonomy of the American continent, profoundly **critical of human subjugation or discrimination**. This emphasis is why decrees and proclamations were crucial aspects of respecting and acknowledging the dignity of women, Indians, slaves and black people: "*The sons of* ***the Spaniards enjoy the invaluable advantage of not knowing but one cult****, why bring them seventy-four?*" (p. 71)

Rodriguez' ideas are quite important for the time, especially everything related to the topic of autonomy and the affirmation of the identity of Americans:

> Englishmen, don't intend on introducing *cherchomania* in the South as it was in North America and nothing will be said of the effects of diversity in cults in other countries. They're fine there, leave them where they are and leave Americans to play their bells how they like: leave them in peace here (as there have enough motives for discord already) (p. 77).

3. **Freedom to think, believe, speak and write:** Rodríguez believed in all forms of freedom, without falling into debauchery. As a believer in youth, he was cautious in affirming that the revolution is for men and not young people. However, in the tone of an essay- and, as a good teacher- he invited young people to write with awareness: "***young people should think and write better than their grandparents if they want there to be a country and a tongue****: this will not be achieved with scruples nor with mocking nor small points of scholarship*" (p. 209).

According to Yvinec, in the time of independence, San Martin and Bolivar enacted a series of decrees and suppressed colonial differences between Indians and non-Indians, abolishing forced labor, tax, suppressing the community and establishing private property. Indians could vote, but the democratic participation understood as political autonomy was not considered good. The vote was dirty and lacked value. In this same sense, Simon Rodriguez' speeches advocate for the freedom of black people and slaves; they also criticize the Spanish and U.S. colonies where they had the objective of benefiting from slavery:

> The man of South America is Bolivar. His enemies put effort into making him appear despicable and pull the opinion of those who do not know him- if they can discredit the model there won't be anyone to imitate him; and if the directors of the new republics do not imitate Bolivar, the cause for freedom is lost (Rodriguez, 2012, p. 16).

The defense of reason, so tied to enlightened thought, is reflected in Rodriguez' defense of Bolivar in the following way:

> Gather, men of reason, around Bolivar to act accordingly in an endeavor worthy of occupying any lover of social philosophy. To those who give ONLY THEIR OPINION for every reason, let them be responded to (in opinion as well) it will not be they who give importance to the Republican Government in America if they don't use other ways than those of assumption; that as long as they don't tie a different logic than that of their OPINIONS, they will clumsily fail the road to representation; and that despite the efforts that have been made for well-intentioned men, new republics will become a mockery when facing European Governments (p. 48).

3. Sources of liberal thought in Simon Bolivar

According to his letters, Bolivar considered his mentor, Simon Rodriguez, the South American Socrates. Perhaps the title goes beyond the intellectual qualities held by Simon Rodriguez, but it allows us to comprehend the level of admiration that Bolivar felt for his mentor and the influence he had. However, it was not always this way. In fact, when Bolivar had Rodriguez as a tutor in Venezuela, during his years of adolescence, he did not get along with Simon Rodriguez. His methods seemed to him drastic and severe, which caused him to occasionally flee the Simon Rodriguez schoolhouse in the middle of the night.

However, the reencounter of Simon Bolivar with his mentor Rodriguez in Europe, after prematurely becoming a widower, transformed the perception he had of his teacher. In 1804, Bolivar traveled with Rodriguez through Europe. During the conversations had on this journey, Simon Bolivar understood Simon Rodriguez's intellectual tenor. In their journeys, they even assisted Napoleon's coronation, a moment that, according to their letters, transformed the meaning of life he had known until then: "The crown that Napoleon placed on his head I saw as this miserable gothic thing. What seemed great to me was the universal acclaim and the interest he inspired. This, I confess, made me think of the slavery in my country and the glory that he who liberated it would conquer" (Salcedo-Bastarde, 1960, p. 60). Bolivar summarizes this admiration in a letter sent in 1824 in which he states to him: "You train my heart for freedom, justice, for the great and beautiful."

With Simon Rodríguez, he read the philosophers of the Enlightenment: Locke, Voltaire, Montesquieu, and specifically Rousseau, from whom Rodriguez held great admiration. In fact, according to some historians (Lozano 1914; Fran, 1956; and Vayssiere, 2008), Rodriguez not only showed interest in the understanding and exhibition of Rousseau's political thought, but he also showed concern for continuing the pedagogy proposed in his work "Emile" (Rousseau, 1991). As a result, some historians deduce that Bolivar was educated with the Emilian model, though there are others that doubt this version.

Of course, Simon Rodriguez was not Simon Bolivar's only mentor. In fact, he was a fortunate student, his studies were prolonged beyond his childhood and among his teachers were some of the most important intellectuals in young America. He studied grammar, literature and geography with Andres Bello; he studied music with Pedro Palacios and