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ENVIRONMENTAL JUSTICE IN CHILE: THE PRICE OF SUCCESS

Ernesto Sagás

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On August 5, 2010, a collapsed tunnel at the San José copper mine in northern Chile trapped one of the mine's fortified shelters when tunnels above them collapsed. They not only managed to survive the accident, but had on hand two days' worth of food. These meager supplies—strictly rationed—enabled them to survive until small supply boreholes reached them on August 22nd. It took sixty-nine days to rescue the miners by drilling a larger borehole and using a rescue capsule to pull them out, one miner at a time. The saga of *Los 33* ("The thirty-three ones," as they became popularly known) riveted the Chilean public and the international community for weeks, and the climatic final extraction of the miners (accomplished in less than twenty-four hours) was watched live by millions across the world. thirty-three miners some 700 meters underground. Luckily for them, they were gathering for lunch in The story was punctuated by developments like the mining company (Empresa Minera San Esteban) declaring bankruptcy and the Chilean government taking over the rescue efforts, the heart-tugging messages between the trapped miners and their relatives who were literally camping on the surface, the swarm of international media outlets descending on the site to cover the event, the surge in the polls for newly-installed Chilean President Sebastián Piñera (who turned the rescue of *Los 33* into a personal matter and a top priority for his administration), and even the birth of a baby girl named Esperanza (Spanish for Hope) to one of the miners while he was trapped underground. In the end, all thirty-three miners and six rescuers came out alive and well, and were received as heroes, with job offers and TV interviews aplenty. There is even a Hollywood movie being planned.

But in the tense wait to know the miners' fate, and the exhilaration about their rescue, a major point was missed: one of the contributing factors to the accident had been a sloppy safety record by the mining company, involved as it was in a mad dash to augment production while keeping costs down. While a mining company with a poor safety record is no big news, in this case it highlighted a larger trend going on in Chile: the country, for decades now, has immersed itself in an all-out national effort to become a competitive player in the global economic arena, and to make of Chile the first Latin American nation to achieve First World status. Chile, "the Latin American country that works" (*el país latinoamericano que funciona*), as Chileans are fond of referring to their country, aims to leave its "developing nation" status behind by embarking on an aggressive strategy of economic growth led by its thriving mining sector. Copper is Chile's number one export and the country—the world's top producer—now supplies 35% of global production. In addition, Chile has 30% of the world's copper reserves. Copper, albeit dominant, is just one of the products that Chileans are banking on to finance their export-led economic growth strategy.¹ More recently, Chile has become the world's second largest supplier of farmed salmon (after Norway) and it is considering embarking on an ambitious program to build hydroelectric dams in its wild, fjord-speckled South (Klinkenberg 2010). The electricity generated by these dams will be carried north by a corridor of power lines to Santiago² and other industrial centers. In others words, Chile is betting that its abundance of natural resources, cheap energy, political stability, an educated labor force, and an export-oriented, globalized, competitive economy will propel Chile into "developed nation" status within the next few decades.³

The ugly underside of this strategy—lost in the jubilation about the rescued miners—is that Chile is degrading its natural environment and affecting the quality of life of thousands of Chileans in the process. Chile, one of the economic leaders of the region, still lags behind poorer neighbors in the way it (mis)uses its natural resources, and pays a price for its success. For example, Chile's Environmental Performance Index (EPI)⁴ score for 2010 was 73.3. While that is an enviable score that places Chile in sixteenth place (up from twenty-ninth in 2008) among 163 countries, it still places Chile fourth in Latin America, after Colombia (76.8), Cuba (78.1), and Costa Rica (86.4), and not very far ahead of Panama (71.4) (Yale University 2010). Why cannot Chile be more like Costa Rica, given its status as an economic leader in the region? Or at least better in its EPI than Cuba and Colombia? Is Chile's economic growth just that, growth without real development?

This article looks at the choices Chile has made from an environmental justice perspective. The first part frames these issues by examining Chile's recent past of dictatorship and democratization, and how it has determined Chile's current economic model. The second part looks at Chile's environmental justice landscape, and the relative lack of influence of this sector in the face of export-led growth priorities. The third part looks at the case study of hydroelectric dam building in Patagonia, a highly-debatable project that threatens one of Chile's most pristine ecological regions in the name of progress (and even of national security). The fourth part compares and contrasts Chile's economic development model with that of Costa Rica, the environmental leader of Latin America and one of the greenest nations in the world (ranked third in the EPI). By looking at Costa Rica, a nation that also manages to provide a high standard of living for its citizens, it is possible to discern trends that have made a difference in these two countries' environmental performance. Finally, the conclusion critically reassesses Chile's economic choices and questions its prevailing export-led model from an environmental justice perspective, while suggesting a more sustainable alternative that does not favor growth at the expense of the environment.

The Authoritarian Legacy

Nowadays Chile is hailed as an example of a functioning democracy to the rest of the region, but it was not always so. After decades of stable democratic rule, the 1960s witnessed the breakdown of a three-way split in Chile's political spectrum between the Left, the moderate Center, and the Right, leading up to the election of socialist Salvador Allende in 1970. Allende's administration further polarized the nation into two camps, and led to a violent takeover by the Chilean military on September 11, 1973. The military junta led by General Augusto Pinochet shut down the Congress and media outlets, abolished left-wing political parties, returned property nationalized by the Allende administration,⁵ and imprisoned, tortured, and/or killed thousands of real or suspected political opponents (Valenzuela and Valenzuela 2011, 510). This thorough de-politicization and de-mobilization of Chilean society was accompanied by a program to restructure Chile's economy based on the free-market-oriented neoliberal tenets of a group of U.S.-trained Chilean economists who became known as the "Chicago Boys." The military opened Chile's economy to foreign investment, removed price controls, drastically lowered tariffs, promoted exports, and allowed its currency to reach a more realistic exchange rate (Sigmund 2007, 175-176). Needless to say, labor unions were disbanded and the military kept a tight leash on any type of political unrest. While its neighbors across the region were protecting their economies and sheltering domestic industries, Chile was doing exactly the opposite. Health and education were opened up to the private sector, and so was the social security system. State industries were sold to foreign and domestic buyers, and the role of the state in the economy was minimized. After some ups and downs (blamed by the regime on the initial impact of the "shock treatment"), the end result was the "Chilean miracle": Chile's economy was one of the strongest in the region. Between 1977-1981 it expanded at annual rates of 6-8%, and fruit, lumber, and seafood joined copper as part of the country's increasingly-diversified export picture (Sigmund 2007, 178-180).⁶

Pinochet's tight rein on power was severely shaken by the results of the 1988 plebiscite, in which Chileans overwhelmingly voted for the "No" option against an extension to military rule, and for a quick transition to democracy on the military's own terms. Democracy was restored in 1990, with the inauguration of Christian Democrat Patricio Aylwin, presidential candidate from the left-of-center *Concertación por la Democracia* (Alliance for Democracy). Thereafter, free and fair elections have been held regularly in Chile, leading to three consecutive victories by the *Concertación* until the triumph of conservative presidential candidate Sebastián Piñera in 2010. The post-authoritarian administrations of the *Concertación* and Piñera have largely kept in place the economic model and policies of the military dictatorship, and even deepened them (Oppenheim 2007, 172-185). Since 1990, Chile's economy has more than doubled in size, abetted by large inflows of foreign investments. The *Concertación* administrations signed free trade agreements with countries all over the world and emphasized maintaining Chile's macroeconomic stability, while promoting a full range of exports besides copper. This export-led model has propelled Chile to the forefront as one of Latin America's economic leaders and now serves as an example for the region and the developing world.⁷ Moreover, its economic bonanza has allowed Chile to invest in social programs (reducing poverty from 45% in 1990, to 13% in 2009) and infrastructure projects such as ports, roads, and highways (Valenzuela and

Valenzuela 2011, 517).⁸ Chile's gross national income (GNI) per capita for 2008 was US\$13,299; one of the highest in the region (OECD 2010).

A majority of Chileans have embraced this economic model, not only for the socioeconomic improvements that it has brought, but also as a way of transcending the divisive politics of the past. Chileans in the street tend to shun political discussions, but love to talk about the country's bright economic prospects and indulge in consumerism (Claude 2006, 170; Marras 1999). This strategy has helped Chileans leave behind their troubled past by downplaying or abandoning politics and focusing on economic issues instead. It is also the result of unresolved contradictions in Chile's representative democracy.⁹ Moreover, these attitudes lead to little questioning of government actions by the majority of citizens, as long as the government delivers in the economic arena, and they create a culture where the politicization of issues is seen as unnecessary and disruptive. Issues such as land distribution, income inequality, and labor rights, which are bitterly contested by significant sectors of the population in other Latin American nations, take a backseat to the pursuit of economic growth in Chile, where only politically marginal groups mobilize over these issues. Not surprisingly, issues such as the environment and ecological degradation barely register in Chile's political radar (Luna 2010, 140).

Environmental (In)Justice in Chile

The field of environment justice looks at the inequitable distribution of environmental resources in society. Based on the normative premise that all human beings have a fundamental right to clean air, water, and access to other environmental goods (e.g., access to safe food, adequate public transportation, green spaces, etc.), environmental justice examines the reasons behind the disproportionate consumption of environmental resources by wealthy groups, industries, classes, and nations, and the dumping of the polluting effects of this consumption on the poor and the politically underrepresented (Stephens 2007). It also studies the ways in which oppressed groups then fight for their environmental rights, which often overlap with other rights (e.g., human rights, cultural rights, indigenous sovereign rights, etc.). As such, environmental justice is not an unbiased field; it unequivocally defends the right of the powerless to a clean, safe environment, and condemns the polluters who evade their environmental responsibilities by not paying for the consequences of their actions. Moreover, the field of environmental justice argues that in many cases, the poor and the politically-powerless are deliberately targeted by polluters, the latter knowing full well that the costs of operating in these communities (or nations) are lower and that the communities' capacity to challenge the powerful is limited at best (Bullard 2005). In this way, polluters seek a "path of least resistance" that will allow them to carry out their business, maximize their profits, and avoid legal entanglements. The "capabilities approach" to environmental justice further argues that "the focus of justice is not simply on the distribution of various goods, but on how those goods are transformed into the capacity for individuals to flourish" (Schlosberg and Carruthers 2010, 15). In practice then, environmental justice goes beyond concern for mere individual well-being and considers well-being at the level of the community (as an aggregation of individuals with environmental rights).

In Latin America's big cities, pollution is less spatially segregated than in the United States, and in a metropolis like Santiago, all citizens regardless of class tend to suffer the effects of poor air quality, water contamination, and noise pollution (Carruthers 2008, 5-6), though some studies have shown that pollution affects the urban poor even more because they tend to live in marginal areas with dusty roads, may lack heat in their homes, and have poor diets (Munasinghe et al. 2006, 289). In developing nations environmental justice is still in its infancy, and it is often overwhelmed by the need for economic growth in order to tackle major national challenges such as poverty (which is, ironically, a major factor behind environmental injustice). Moreover, few developing nations have incorporated environmental justice provisions into their laws, and fewer still have the strong, well-institutionalized judiciary systems needed to bring powerful polluters to justice.

Chile's case is that of a country bent on achieving "developed nation" status in which environmental concerns often fall victim to economic growth priorities. "*Chile debe crecer*" ("Chile must grow") is the oft-repeated slogan of the political and economic groups in power.¹⁰ In other words, Chilean government agencies, NGOs, and the public may express their concerns about environmental degradation, but at the end of the day, powerful economic interests trump these concerns. A good example was Chile's 1994 comprehensive environmental law (Law 19.300). The original bill clearly borrowed more from market-friendly forces than from the defenders of sustainable development. For example, the bill prioritized pollution control with end-of-pipe technologies, rather

than the prevention of pollution in the first place. It also privileged private property rights over environmental concerns, and sought to minimize restrictions on natural resource exploitation. On top of that, Chile's National Environmental Commission (CONAMA for its Spanish acronym) was a weak coordinating body, with little capacity for enforcement, and stacked with market-friendly bureaucrats (Silva 1995). In 2010, a Ministry of the Environment was created, elevating environmental issues to a cabinet-level position, but the ministry has yet to show any teeth.¹¹ All of this in spite of the fact that Chile's 1980 Constitution (in Article 19) established the "right to live in an environment free of pollution" (República de Chile 1980). Chileans face a slate of environmental justice problems and challenges: air pollution (from mining and industrial operations, but also from motor vehicles), water contamination (from domestic and industrial effluents), water scarcity (particularly in the arid North), poor urban planning, inappropriate solid waste management (including hazardous wastes), land erosion and degradation, threats to native forests (from logging, loss of biodiversity, and coal mining), and depletion of fishing resources (Munasinghe et al. 2006, 265). But why is that? Why is there such an apparent disconnect between declared intentions and actual actions?

The first factor is the heavy historical legacy of economic growth patterns in Chile. Never an industrial powerhouse, Chile has traditionally based its economic schemes on the extraction and exploitation of natural resources. Nitrates and copper are the most glaring examples, but more recently timber, wood chips, and salmon can be added to the list. For Chile, as for many other countries, growth has meant tapping into vast natural resources. In Chile's particular case, these resources lie in remote regions with low population densities, so much so that the environmental consequences of these actions are rarely felt by most Chileans. For example, copper is mined in the remote desert regions of Chile's north, while timber resources lie in the temperate rain forests of the south, where the rugged topography of the land has kept human settlements historically small. But what seems like a blessing might actually be a curse. In a geographically-diverse and geographically-isolated nation, with ample resources lying far away from major populations centers, Chileans do not get to see or feel the environmental consequences of their actions. Ecosystems and human settlements do get affected but, by and large, most Chileans do not even notice it. Thus, the "frontier" nature of Chile's resources has lent itself to unscrupulous exploitation over decades, with little backlash from ordinary Chileans.

Second, the military dictatorship of Gen. Pinochet and its free market economics development model gave a new impetus to the extraction of Chile's natural resources. The regime returned land that had been nationalized to its private owners and engaged in the widespread selling of government assets to private industry, while relaxing or eliminating environmental policies and labor laws in an effort to lower the costs of doing business in Chile. The heavy-handed measures of the dictatorship also included the dismemberment of peasant labor unions and cooperatives, as well as policies that made it impossible for small-scale farmers to compete with agribusinesses. The end result was the concentration of land, capital, and natural resources in the hands of oligopolistic business conglomerates (who were powerful backers of the regime), while at the same time creating a large pool of labor in the forms of landless peasants. Chile's peasants and workers (two problematic groups from the point of view of the military) were thoroughly emasculated by governmental repression and policies that took away their hard-earned rights and forced them off their lands. Chile's businessmen, on the other hand, had ample freedom to operate. This model not only set back the labor and peasant movements for decades, but also had major detrimental effects on Chile's ecology as environmental concerns were overlooked or in many cases blatantly ignored. For example, the regime and timber companies displaced peasants and turned them into rural proletarians, who then served as a cheap labor force as these companies took over and exploited Chile's sizeable timber resources in the south (Klubock 2004b). In addition, these timber companies, once done with the cutting down of native forests, quickly replaced them with plantations of exotic species, such as Monterrey (a.k.a. Radiata) pines and eucalyptus, which grew quickly and commanded good prices in the international markets. These exotic species undermine Chile's amazing biodiversity and create a slate of ecological side effects by homogenizing Patagonian forests. The lack of plant diversity in turn affects native fauna and flora (which lose native habitats or cannot compete with invasive plant species), as well as the peasant populations that live off a naturally-diverse land.

Third, the policies of the military dictatorship also set in motion political practices and a culture of doing business that prevail to this day, and a social hierarchy to sustain them. As made clear by its ruling elites, economic growth is Chile's number one priority. For the military, economic

growth was a national security matter since it provided resources for the Chilean state and its large military apparatus, bolstered the regime's status, and turned Chile into a regional leader. A strong economy made for a strong nation, and anyone who dissented from this maxim was labeled a "communist" and considered an enemy of the state. Thus, the military regime weakened Chile's fledgling environmental movement, which in the best of cases found no receptive ears among the military, and in the worst, was targeted for repression. For example, peasant activists who organized themselves against timber companies were arrested and charged under anti-terrorism laws enacted by the military regime (Klubock 2004b). Things improved after the dictatorship, with many social movements joining or supporting the *Concertación*. After its triumph, however, many NGOs have been co-opted by the government and depoliticized; while others—well-funded by foreign sources—have been apolitical since their inception. Those NGOs and other social movements that have tried to remain independent, including grassroots environmental justice movements, are marginalized from decision-making by a government bent on avoiding conflict and making sure all actors subscribe to the "rules of the game." Big business, on the other hand, exerts considerable power and influence through well-financed organizations.¹² Chilean business interests also control the media, influence the intellectual agendas of some universities, and have direct channels into conservative and moderate political parties, to the extent that they represent a hegemonic business class (Taylor 2006, 108-110, 127).¹³

Fourth, while Chileans enjoyed a restoration of individual freedoms after the return to democracy in 1990, economic priorities remained the same. The environmental movement enjoyed a revival, as did labor unions, peasant organizations, and indigenous groups (notably the Mapuche). Left-of-center environmentalists even came to control government agencies in the *Concertación* administrations. But all these achievements did not translate into meaningful changes in the way of doing business. Environmental bills supported by hopeful environmentalists were initially blocked by a Senate stacked with right-wingers (including "senators-for-life" from the military), and eventually defanged by a government bent on compromising with industry in the pursuit of economic growth (Silva 1995, 1997). Moreover, repression of activists continued under the *Concertación*, which took advantage of the existing anti-terrorist laws to jail unruly peasants and Mapuche troublemakers (Carruthers 2001; Carruthers and Rodriguez 2009).¹⁴

Fifth, external actors such as trading partners and the World Bank support Chile's market-oriented, export-led model. While environmental safeguards are often part of trade agreements and foreign economic aid, they are but a small part of a more extensive agenda of social, economic, and political neoliberal reforms being pushed by these external actors. Their emphasis on small government, private property rights, and openness to foreign investment strengthens the hand of the domestic market-oriented forces while weakening the environmentalist sector (Silva 1995). Moreover, as Chile becomes more integrated into—and dependent on—the global economy, the more "mainstream" and accepted these conditions become, and the harder it is for Chile to enact radical changes in its way of doing business in order to protect its people from pollution and its natural resources from depredation. Environmental bills will face stronger opposition and environmental protection policies will become harder to enforce effectively, while reinforcing an ongoing cultural shift towards market-friendly, export-led growth that has been in the making for decades. Chile is not only becoming a globalized nation on the brink of First World status; it is also acting like one by emphatically embracing the policies of its lenders and trading partners.

Finally, perhaps the most insidious challenge is the historical perception among Chileans—and abetted by the government—that Chile's resources are vast and inexhaustible. Chile is a big country with a small population and large quantities of natural resources, not unlike the United States in the early nineteenth century. Just like Americans when they thought of the western frontier in the nineteenth century, Chileans imagine their remote regions as treasure troves that ought to benefit the nation. Chile's northern and southern frontiers are imagined as empty and devoid of people, but full of resources for the taking. Why should Chileans remain poor when the country has such ample resources? The answer to that question has been an easy sell for generations of Chilean politicians, and its legacy still remains. While Chileans are more conscientious about environmental issues nowadays, and the environmentalist community is well developed (though divided), the ideological and political legacy of decades of export-led growth based on the exploitation of natural resources is hard to overcome, and in some cases, next to impossible due to the legal impunity with which polluters typically operate. The "frontier" mentality prevails, and even when environmental concerns

seep into the debate, they are usually dismissed as the cost of doing business (and for which there are often technological solutions). As for the human costs of environmental degradation, again, these are seen as sacrifices that some have to make for the greater good of the Chilean people.

Case Study: Hydroelectric Dams in Patagonia

The recent corporate assault on Patagonia clearly illustrates these issues. Patagonia is a large territory that encompasses the southernmost portion of South America. Divided between Chile and Argentina by the Andes cordillera, Chile's Patagonia is a rough land of thick rain forests, deep fjords, and snowy mountain ranges dotted with glaciers. Patagonia is the quintessential frontier; remote, inhospitable, and "empty" but full of resources. For decades now, timber companies have logged in northern Patagonia, while salmon farms have crept up its fjords and spread their operations further south.¹⁵ In the process, the land has been cleared, the oceans polluted, and the inhabitants of the region displaced and dispossessed. Patagonia holds an incredible amount of unique plant and animal species, and given the isolated, rugged nature of the region, large areas are still in pristine state.

The latest assault on Patagonia's resources comes from a project that proposes the building of hydroelectric dams to tap into the region's wild rivers. Chile's fast-paced economic growth and modernization have required increasingly large amounts of electricity to sustain them, of which Chile has little. While a couple of dams have been built in northern Patagonia, the latest project is of gigantic proportions and seeks to harness Patagonia's enormous hydroelectric potential to guarantee Chile's electric supply for decades to come.¹⁶ Actually, the potential is so great that even smelting companies showed interest in the region at one point, envisioning Patagonia as a supplier of the enormous amounts of power required to run a major smelting operation in southern Chile.¹⁷ According to an expert, "It could turn Patagonia into a vast factory for electricity" (Barraclough 2009).

The project is the brainchild of Endesa, a Spanish power company, in association with Chilean entrepreneurs (known jointly as HidroAysén). The megaproject fits perfectly within the prevailing mindset of growth and modernization at any cost. It calls for building five dams on the Baker and Pascua rivers (the largest in Chile's Patagonia) located in the Aysén region.¹⁸ As part of the dictatorship's legacy, these companies already own rights to the land and the water, and want to cash them in.¹⁹ The electricity generated in this remote region would then be carried by massive transmission lines over 1,400 miles to Chile's industrial center (Natural Resources Defense Council 2007). The project would flood thousands of acres of the Patagonian heartland, and carve a swath of cleared forest across national parks and other protected areas for the building of a 120-meter-wide treeless corridor for the 70-meter-high transmission lines that the project contemplates (Vince 2010). Once built, the new dams would have a lifespan of decades, causing irreversible ecological damage to Patagonia. River flows will be drastically altered by the gigantic dams, roads will be built into wilderness areas, men and machinery will create a significant footprint in the area, native species will be threatened with extinction, and local ecosystems will be thrown out of balance. Even if the dams were to be removed in the distant future, it would be impossible to return the area to its original pristine condition or bring back the extinct species. It would also displace local inhabitants, including the indigenous Mapuche, and destroy precious ecosystems in a rich, yet ecological-sensitive zone. The Mapuche had previously been harmed by the Ralco dam project, which flooded thousands of acres of ancestral Mapuche Pehuenche lands and divided their territory with new roads and highways. The affected zones include agricultural and cattle ranching land, as well as culturally-sensitive areas such as burial grounds. Moreover, the Pehuenches' traditional lifestyle of moving between summer and winter pastures in order to raise their cattle and collect *piñón* nuts has been irrevocably disrupted by the Ralco dam. In this particular case of environmental racism, the Pehuenches were not only being threatened as individuals affected by the loss of land, but their cultural practices and beliefs, and the ability of their communities to reproduce them, were at stake too. In essence, they were "fighting for the capabilities necessary for their communities to function fully" (Schlosberg and Carruthers 2010, 18). In the end, the Pehuenches protested their dispossession and relocation vigorously, only to be repressed by the authorities (Aylwin 2002; Carruthers and Rodríguez 2009; Claude 1997; Namuncura 1999).²⁰

The project, with the backing of powerful national and foreign economic interests, was finally approved by the Piñera administration in 2011. As it has happened so many times, Chilean NGOs and some government agencies expressed their concerns, but in the end, economic priorities carried enormous weight. Chile needs the electric power, and the government, with its "hands off" attitude

towards business, left the electricity market in private hands. As a result, little governmental planning in the energy sector has ever taken place, thus creating a national problem in which private industry now has a free reign to explore various profitable solutions. HidroAysén has fought back accusations of ecocide with a publicity campaign stressing Chile's urgent need for more electric energy and the "clean" nature of hydroelectric dams, in contrast to the coal-fired plants Chile still relies on. The company has also portrayed a stark economic future for Chile if the dams are not built; a prospect that touches a raw nerve in the public opinion that embraces Chile's growth model and its economic benefits. But what about environmental justice concerns? What about the people whose lives will be drastically altered by HidroAysén's plan? What about the irreparable environmental damage to Patagonia?

Chile's growth model is predicated on expanding its export-led economy, and in doing so, some will suffer the socioeconomic and environmental consequences. These "frontier" populations are expected to bear the burden, while urban Chileans reap the rewards of the country's modernization. To use a U.S.-coined term, Patagonia is expected to become a "national sacrifice area" in order to fuel Chile's unfettered growth. From an environmental justice perspective, two things are inherently wrong with this approach. First, a politically underrepresented, rural, "frontier" population, marginalized from Chile's urban mainstream, is being unduly burdened with the costs of modernization, while urbanites in Santiago and other cities enjoy the benefits of the project. And second, polluters do not pay the price for this megaproject, while extracting handsome profits from it. In the end, it is solely the people of Patagonia who pay the price—or is it? I would argue that Patagonians, Chileans, and the world ultimately pay the price in environmental degradation and the loss of unique native species, irreplaceable ecosystems, and some of the wildest places on earth. Urban Chileans may enjoy the ride, but someone has to pay the fare; and in this case, it is not just the displaced inhabitants of Patagonia.

The Costa Rican Alternative

Chile is paying a hefty price in ecological degradation in its bid to join the exclusive club of the world's developed nations. In all honesty, it is disingenuous to blame Chile (or other aspiring economic powers like India or Brazil) for doing exactly what other developed nations did to get where they are now. It is a very tempting strategy, particularly for a nation that just a couple of decades ago emerged from a nightmarish military dictatorship, and in which most ordinary Chileans prefer to look forward to a bright economic future rather than to dwell in a painful and politically polarizing past. Yet, just as Chile is emulating the model followed by developed nations, it should also be aware of its pernicious side effects. Already, emerging economic giants such as China and India have experienced the ecological consequences of a model that prioritizes exploitation over conservation. Chile now finds itself at an ecological tipping point, where it is still not too late to change tack and follow a more sustainable and socially just development model before extensive damage is caused to Patagonia's unique ecosystem, as well as to other parts of the country.

So, what alternative models could Chile consider? First, Chile does not have to follow an aggressive, export-led growth model based on the extraction of natural resources in order to provide its citizens with decent lives. If anything, Chile could be mortgaging the future of its people by embarking on these poorly-conceived megaprojects. Perhaps instead of thinking big, Chilean leaders should think small. Like China and India, Chile also wants to become a First World nation. But success comes with a price, and if Chile's leadership could learn anything from the recent Chinese and Indian cases (and historically, the case of the United States, too), it is that the price for rapid growth can be steep and the results are often meager and disparate. Unfettered economic growth has reduced poverty but not inequality; Chile's society is wealthier, but not more equitable (Taylor 2006). Chile perhaps could benefit from examining the lessons of the Costa Rican case. While Costa Rica is no economic powerhouse and still struggles with social and environmental challenges, its slow, persistent commitment to conservation and social equity has created a society with no large social disparities and one of the greenest nations on the planet. Sustainable development has become the key to a more environmentally just society in Costa Rica; not rapid economic growth.

Costa Rica's rise to the forefront of the environmental movement is the more surprising considering Costa Rica's paucity of resources and the huge environmental challenges that it faced just decades ago. As described by Steinberg (2001, chap. 3), in barely half a century Costa Rica went from a country facing a landscape denuded by deforestation to becoming a model of conservation.²¹ Costa Rica's enlightened leadership recognized the nation's environmental challenges early on, and in spite

of many obstacles and setbacks, managed to protect large tracts of its territory while raising the people's awareness about conservation and the protection of Costa Rica's unique natural resources. These leaders, coming from both of Costa Rica's main political parties, also prioritized education and the development of a strong civil society. As a result, Costa Rica nowadays boasts a well-educated population (with high levels of environmental consciousness), a plethora of environmental non-governmental organizations (more than any other country in the region), a strong civic culture that rests on discussion and consensus, and a thriving eco-tourism industry, along with a well-managed use of its natural resources for farming, ranching, and bio-prospecting (Blum 2008; Steinberg 2001).²²

Chile, of course, is no Costa Rica. First, their historical experiences are very different. Geographical isolation, the lack of mineral wealth, and coffee—and the land tenure patterns that it fostered—created a more egalitarian society in Costa Rica (Peeler 2009, 53-56; Seligson 2007, 453-454). Chile's copper, on the other hand, led to major capital outlays, foreign investment (and influence), the concentration of wealth in a few sectors, the creation and exploitation of a cheap labor force to mine it, and a praetorian state to protect it all that ended up taking control of the copper industry in 1971 (Klubock 2004a). Under such conditions, egalitarianism cannot take root. Chile's other main economic sectors have followed the same pattern. Copper, timber, and salmon have created rapid wealth for Chile; a "resource curse" similar to the case of oil in developing nations. Such wealth, acquired so quickly and so relatively easily, and with oligopolistic business conglomerates greatly benefitting from it, has only served to perpetuate social disparities in Chile. Chileans hope that this wealth will eventually trickle down and uplift the poor, but so far, it has not been able to close the income gap and these prevailing social disparities build political pressure that could invite authoritarian responses from the state.

Second, Chile has had a historically strong state, with a top-down management style, and a powerful praetorian military. Chile's military were crucial for the nation's expansion to the north and the acquisition of lands rich in nitrates and copper, and even though the military have not been in power since 1990, their political influence remains a force to be reckoned with. Costa Rica, on the other hand, though it had its authoritarian interregnums since independence (and a strong state with a history of prudent competence), successfully abolished its military in 1948, thus eliminating a potentially interventionist force from the political arena (Peeler 2009, 55-56; Seligson 2007, 457). In all fairness, Costa Rica could more easily afford to do so after its brief civil war. Chile, having to contend with long-standing conflicts over territory with Bolivia and Peru, and border disputes with Argentina, could not. But the price that Chileans paid for a strong military was dear, not only in terms of the lives and liberties lost during the Pinochet dictatorship, but also for the radical reorientation of the economy that took place and that constraints Chile's choices to this day.

Finally, the two countries have widely different political cultures. Costa Rica is not only a model of economic egalitarianism and democracy for developing nations, but it has evolved, over decades, a civic culture that promotes conservation over exploitation—a veritable "green ethos."²³ Long ago, Costa Ricans decided that their natural resources were the nation's biggest assets. But instead of exploiting them through destructive extractive industries, Costa Ricans have opted for a sustainable development strategy, slowly reaping the benefits of their natural endowment while renewing the resources, or promoting industries like locally-based, eco-friendly tourism that have a minimal ecological impact and make smarter use of existing natural resources while still providing jobs for local populations. Chile, on the other hand, has embarked itself on an altogether different path when it comes to its natural resources, fully exploiting them in a concerted attempt to make it to the First World. This strategy has taken a serious toll on Chile's environment, and it shows no signs of letting down. As of 2006, raw or semiprocessed natural resources still accounted for more than 80% of Chile's exports (Oppenheim 2007, 193-194), a pattern typical of "resource curse" economies. Environmental concerns in Chile bow to macroeconomic success; the green ethos yields to neoliberal imperatives.

Does that mean that Chile will never be like Costa Rica? Probably, but on the other hand, while Chile is no Costa Rica, it can learn valuable lessons from the latter's experience. First, Chile could use stronger environmental legislation; laws with real "teeth." So far, environmental laws in Chile have rarely forced the hand of private industry, which knows how to exert its power and influence over the political authorities (Claude 2006, 181). Second, Chile needs to develop a stronger environmental activist community. Its inherent weakness and atomization is to a large extent the result of decades of dictatorship and repression, but it is increasingly becoming more vocal and influential, as was clear

during the loud street protests in Santiago over the HidroAysén project. Also, as Chile becomes more globalized and integrated—ironically thanks to neoliberalism—environmental issues could potentially become more salient in Chilean politics. The green policies of the developed nations could slowly seep into the politics of those eager to do business with them, and trade agreements with the developed North will hopefully force Chilean businesses to clean up their act (Muñoz 1997, 118), though so far the environmental clauses of trade agreements have been very ineffective. Finally, Chile should invest in environmental education, as Costa Rica has been doing for decades (Blum 2008; Locke 2009). This is the only change that in the long term will be truly meaningful. As a result of the policies of the Pinochet dictatorship, two generations of Chileans have been socialized to pursue the neoliberal model without much questioning (and those groups that have questioned or resisted it in the past have been thoroughly emasculated by political repression). Now, up-and-coming generations of Chileans have to be made aware of the importance of preserving their country's natural resources, of the pernicious environmental consequences of the unfettered export-led growth strategy currently being pursued, and of the social and environmental inequalities that it has created and perpetuates to this day. As passionate as many Chileans currently are about economic growth, so could the next generations be about protecting and preserving Chile's resources. If Chile's leaders were to support it this course of action, it would be the best investment Chile could ever make.

Of course, the implementation of these measures would require a radical break with Chile's export-oriented, neoliberal economic model, an option that both the *Concertación* and Piñera administrations are unlikely to even consider. It is up to Chile's progressive, often oppressed sectors (e.g., environmentalists, peasants, indigenous groups) to challenge the prevailing view espoused by the government and business conglomerates by taking advantage of Piñera's sliding popularity, the global economic crisis, and an overall more benign climate of respect for human rights after decades of democracy in Chile. As demonstrated by the HidroAysén project protests, Chile's environmental activists have goals in common with other political sectors, including the progressive wing of the political establishment. Even though the HidroAysén project was approved, their protests brought them together for a common cause. As Chile's export-led growth continues at full pace, there will be more opportunities for these groups to cooperate and enlarge their political base. Moreover, as more and more ordinary Chileans bear the brunt of the global economic crisis, they will be more inclined to question and perhaps challenge the system. Chile's political and economic order is starting to show some cracks and that could be an opening for the consideration of more environmentally-friendly alternatives (such as Costa Rica's).

Conclusion: A Greener Chile?

A recent development in the environmental justice field has been its connection with sustainable development. It is no longer enough to mitigate environmental damage after it occurs and to compensate those affected by it; environmental injustices need to be stopped before they take place (Faber and McCarthy 2003). Sustainable development calls for living within our means, providing decent lives for all members of society (i.e., social justice), and guaranteeing that future generations will also get to enjoy the same quality of life and abundance of natural resources as present generations do (Paehlke 1995). In other words, "sustainable development policies prioritize equity over the criteria of economic effectiveness and efficiency" (Martin 2004, 155).

Costa Rica has embarked on such a path by promoting the development of a "green ethos" among its citizens. Among its many "green" policies, Costa Rica encourages participatory democracy, promotes biodiversity in its ecosystems, has taken a serious stand on climate change, is committed to a balanced economy that promotes short- and long-term sustainability, has tried to lessen its dependency on costly and environmentally-damaging energy sources (such as hydroelectric power), emphasizes bio-literacy, and is expanding its national parks (Martin 2004).²⁴ Could Chile seek to emulate some of these "green" policies by expanding its stable (but not very participatory) democracy in ways which would encourage more grassroots input from groups that have been historically marginalized in Chilean society, such as women, peasants, indigenous people, and grassroots environmentalists? Moreover, Chile's unique geography (a long, narrow country sandwiched in between the Andes and the Pacific Ocean) encompasses several unique ecosystems which should be protected in the interest of preserving Chile's biodiversity. These, in turn, could potentially become tourist draws, as has been the case in Costa Rica. Chile could also benefit from becoming more engaged in climate change issues. Located at a southern latitude, Chile is being directly affected by

the hole in the ozone layer over Antarctica. While the country led the way to ban aerosols and industrial emissions that destroyed the ozone layer, it has done little when it comes to dealing with other contaminants, particularly those that are produced by its own extractive industries. As for energy sources, Chile still relies on coal-powered plants and hydroelectric power; and as the case of dam building projects in Patagonia suggests, the country's leadership is willing to invest in more of the same. Instead, Chilean companies and foreign investors could be tapping into unlimited, clean energy sources, such as wind, ocean currents, and solar energy, making money and creating jobs from these "green" industries. With thousands of miles of coastline, abundant sunshine in the desert North, and a consistently windy South, Chile has plenty of renewable energy sources waiting to be utilized.

But perhaps the greatest challenge for Chile lies in balancing its economy to promote short- and long-term sustainability. Can Chile realistically slow down its pace, think about the consequences of its export-led model, and reexamine its national priorities? Do Chile's elected leaders want real (sustainable) development or just pure economic growth? The answer could well mean whether Chile becomes a country that will provide an equitable standard of living for its people (and future generations), or just another example of the mismanagement of natural resources in the race to make it to the First World. There is still time for Chile to switch tracks; though it remains to be seen if it can overcome the heavy legacy of decades of authoritarianism and the impetus to grow at all costs. In the words of imprisoned Mapuche activist Patricia Troncoso in her letter to Chilean President Michelle Bachelet:

From here, I want to encourage you to continue defending us from this predatory economic system that is seeking to pillage the little bit of nature we have left, and it is inhumane, because any economic project in our Mapuche territory is considered more valuable than we are, and immoral because the only human goals it leaves us are money and consumerism (Zibechi 2008).

Notes

¹ In the 1980s, copper accounted for 80% of Chile's total exports. By 2005, it only accounted for almost 40% of total exports (Munasinghe et al. 2006, 241). Still, in 2010 copper contributed US\$5.8 billion to Chile's coffers (Hernández 2011). But copper also happens to be Chile's largest source of industrial pollution, in the form of sulfur dioxide emissions, particulates, arsenic, and metallic residues (Munasinghe et al. 2006, 266).

² Chile's capital houses about a third of the country's population, estimated at seventeen million in 2010 (Instituto Nacional de Estadísticas 2004, 19). It is also Chile's industrial and financial center. Santiago is a classic example of a primate city, where a country's leading city overwhelms all others in its size, importance, concentration of wealth, and use of resources.

³ The 8.8 magnitude earthquake of February 27, 2010, put a damper on Chile's plans of continued economic growth. Beside killing hundreds and causing an estimated US\$15-\$30 billion in damages (Figman 2010), it also exposed serious flaws in the way the government initially handled the crisis. In addition, dozens of buildings that supposedly had been erected under strict codes to resist earthquakes cracked or collapsed, a clear sign of negligence or corruption.

⁴ A detailed explanation of the EPI can be found at <http://epi.yale.edu/>.

⁵ The national copper company (CODELCO for its acronym in Spanish) was an exception. Being very profitable, the Chilean military decided to keep it under its control. Law 13.196 decrees that 10% of copper profits are to be slated for defense. In 2010, this benefit amounted to US\$1.311 billion (Hernández 2011).

⁶ The military regime certainly exaggerated its economic accomplishments. In real terms, per capita incomes only rose slightly during Pinochet's tenure in power. However, the external debt was reduced, inflation was controlled, unemployment was low, and Chilean businessmen brimmed with confidence (Valenzuela and Valenzuela 2011, 512).

⁷ In 2010, Chile joined the OECD, becoming just the second Latin American nation to do so (after Mexico).

⁸ Again, some of these figures have been questioned, and may depend on how the government decides to measure “poverty.”

⁹ Survey research data from the Latin American Public Opinion Project in Chile shows an interesting paradox: broad consensus around the Chilean economic model (and the government’s performance in this sector), but low support for democracy and many of its institutions (such as the political parties). A particularly troubling issue for a country that emerged from an authoritarian regime just decades ago is the seemingly lack of interest of Chile’s youth in the political system (Luna 2007, xxi-xxiii; Luna and Zechmeister 2010, xxviii).

¹⁰ Former *Concertación* President Ricardo Lagos (2000-2006) made export-led growth the main priority of his administration by often remarking that “more growth is more wealth for the country” and “exports are becoming the engine of our growth.” Slogans challenged by Claude (2006, 25, 138, 186) when he asks himself: “Who grows when Chile grows?”

¹¹ On February 15, 2011, an open-pit coal mining project capable of producing up to six million tons per year was approved on Riesco Island, located in Chile’s remote South (XII Region of Magallanes) (Henríquez 2011). The approval took place over local and national protests, and in the midst of controversy, because President Piñera is a stockholder in one of the companies involved in the project. So far, the Ministry of the Environment has taken no action.

¹² Three family-majority-owned business conglomerates dominate large sectors of the Chilean economy: the Luksic group in mining, the Angelini group in fishing and forestry, and the Matte group in forestry. These groups benefitted handsomely during the dictatorship, but their greatest expansion took place during the *Concertación* administrations, particularly after Chile entered into free trade agreements with several close trading partners in the hemisphere, Europe, and Asia. As they expanded, these groups also diversified their portfolios, brought in foreign partners, and began establishing economic links with each other, to the extent that nowadays they represent a cohesive, unified block with the main goal of advancing Chile’s export-led growth in order to maximize their profits. This political project is promoted through the rotation of individuals between private industry and government positions, trade and business associations, think tanks and institutes, and the lobbying and campaign financing of elected officials and candidates (Claude 2006, chap. 2).

¹³ In 2005, the general manager of Celco Arauco, a polluting cellulose factory, boasted in front of an academic audience that environmental conflicts were solved with “calls to La Moneda [Chile’s presidential palace]” (Claude 2006, 181).

¹⁴ The Mapuche people have historically been one of the most oppressed ethnic minorities in Chile. Once the masters of their land, European incursions and subjugation reduced them to small reservations. It is estimated that the Mapuche once ruled over 31 million hectares of land; by 2004 they had just about 250,000 hectares left. The military regime totally ignored their plight, while the *Concertación* paid lip service to their concerns but did little to alleviate their situation. To this day, dozens of Mapuche activists remain incarcerated for defending their lands (Claude 2006, 126-127; Rodriguez and Carruthers 2008).

¹⁵ See Schurman (2004) on the detrimental impacts of Chile’s salmon industry, particularly on workers and the environment.

¹⁶ Chile imports more than 90% of its oil, gas, and coal (Rohter 2006). Most of its gas comes from neighboring Argentina—since Bolivia refuses to sell to Chile—which makes energy independence a national security priority for the Chilean government.

¹⁷ In 1995, Canadian-owned Noranda proposed a plan to build two dams in the Aysén region to supply power for an aluminum smelter capable of producing 440,000 tons of aluminum bars per year, for a total investment of US\$2.75 billion. Ironically, the plan was defeated by another major polluter: Chile's salmon industry, which saw its operations threatened by the amount of solid waste and water pollution that the smelter would have produced (Black 2006).

¹⁸ Chile is currently divided into fifteen administrative regions, which are in turn divided into provinces. Aysén (or Region XI) is the least populated of all.

¹⁹ Under the terms of the 1981 Water Code, approved under the Pinochet dictatorship, water in Chile is a private commodity. Nowadays, 85% of the country's rivers and lakes are privately owned (Larrain and Schaeffer 2010).

²⁰ The repression and marginalization of the Mapuche Pehuenche has been going on for decades. The latest affront has been that while the Pehuenche own their lands, under Chilean law, they do not own the water rights. Those were sold to ENDESA, the Spanish electric company behind the Ralco dam project. The same law also applies to mineral rights (Azócar et al. 2005; Namuncura 1999).

²¹ One of the paradoxes in Costa Rica's environmental history was that it experienced some of the highest rates of deforestation in Latin America (in the 1980s) at the same time that large swaths of its territory were being preserved as national parks (Blum 2008, 357).

²² There are critics of the Costa Rican model who point out to the heavy-handed ways in which some of the national parks were created, forcing peasants out of their land and permanently detaching them from their natural surroundings. In other words, prioritizing a pristine ecosystem devoid of humans over the needs of the local populations that previously inhabited and lived off these lands. See Vivanco (2002) for a critical perspective on the creation of the Monteverde Cloud Forest Reserve.

²³ I would like to thank John Peeler of Bucknell University for the term.

²⁴ Costa Rica values its national parks not only for conservation purposes, but also as "biodiversity factories" that if wisely managed will provide income for future generations in the form of low-impact eco-tourism (Martin 2004, 165).

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AMAZONIAN CONQUESTS AND THE POLITICS OF DEFORESTATION

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Introduction

A recent *New York Times* publication reported on the relationship between deforestation in the Amazon and a policy shift from Brazil's recently elected President Dilma Rousseff (Barrionuevo 2012). The article underscored recent advances in preservation, noting that deforestation in Brazil had successfully slowed over the past ten years. Yet environmental activists are now contending with a provision allowing Rousseff to reduce the land set aside for conservation, testing the Forest Code enacted forty seven years ago. International pressure faces Brazil's Congress as Rio de Janeiro prepares to host the United Nations Conference on Sustainable Development this summer. Agriculture accounts for twenty two percent of Brazil's Gross Domestic Product, and thus the pressure to continue developing while also protecting the rainforest is immense. In the popular imaginary, the debate between conservation and land use is reduced to the question of protectionism at the expense of negative global climate change.

After several waves of environmentalism locally, nationally, and internationally, scholarship emerging from and on Latin American environmental issues has accelerated at the end of the twentieth century and into the twenty-first century. Inspired in part by increased international interest in conservation due to global climate change, awareness of environmental crises has also risen because of Brazil's prominent role as a leading economic power during this ongoing global economic crisis. The country has been thrust into the international public eye as it prepares to host the FIFA World Cup in 2014, and Rio de Janeiro will welcome Olympians in 2016. Environmental principles did not originate in the national period, however, but are based on centuries of traditions rooted in profound inequities. This article traces the complicated relationships among progress, development, conservation, and politics by focusing on colonial philosophies of land use and their shifts in the modern period. This essay has two goals; first, to trace environmental policies in the colonial era and distinguish how these philosophies and practices became engrained in patterns of land use; and secondly, to examine contemporary ideologies of land use and their relationship to political change.

Colonial Enterprises

Previous scholars have argued that concern over environmental injustices are rooted in inequalities as an outgrowth of international markets and are "symptomatic of systemic tendencies of globalization" (Byrne, Martinez, and Glover 2002, 8). The western tendency to locate the onset of globalization in the nineteenth and twentieth centuries disregards prior trade and contact between East and West, and Iberian contact in African and Atlantic expansion. Scholars of Iberia and Latin America have suggested otherwise, pinpointing globalization as a sixteenth-century phenomenon commencing with Portuguese exploration in West and West Central Africa, and Spanish movement westward. In *Modern Inquisitions*, for example, Silverblatt revises Hannah Arendt's identification of global imperialism and race thinking in the nineteenth century, citing the sixteenth-century colonization of Latin America and the Caribbean as the onset of imperial bureaucracies rooted in racialized ideologies (2004). Another approach locates economic globalization in the 16th century, prompting an intellectual, cultural, and ideological *mélange* in the New World that commenced with the colonization of Mexico. Gruzinski contends that "if we knew the sixteenth century better—the century of Iberian expansion, not just of French religious strife and Loire-style *chateaux*—we would no longer discuss globalization as though it were a new, recent situation" (2002, 4). In his study of cultural miscegenation and its outcomes, Gruzinski underscores the Amazon as an idyllic imaginary among European explorers. Its seemingly impenetrable boundaries made the region perplexing and appealing. Incorporating the scenery of the New World into the European imaginary resulted in diverse interpretations of native communities and the lands they inhabited. The distance traveled from Western Europe to New Spain, Brazil, and Peru was paralleled by the exoticism attributed to "primitive" cultures. Early voyages by Jean de Léry and Hans Staden evoked images of a mystic land laden with savages and cannibals.

Colonialism involved a shift of peoples, products, and ideologies that resulted in the conceptualization of the sixteenth century as the origin of globalism by many scholars of Latin

America. The sobering experience of the Portuguese along the western coast of Africa resulted in the establishment of trading enterprises for immediate profit in Portuguese America that reversed images of paradise on Earth (Holanda 1959). Warren Dean contends: "that the Portuguese intent was to conquer and transform this territory and not to submerge themselves in it or allow themselves to surrender to its native culture is evident in their limited appreciation of its vegetation and animal life," emphasizing instead potentially profitable exports (1995, 54). Environmental studies of the brief Portuguese experiment with Brazil wood reveals the causes of this failed enterprise. Portuguese forest policy, though conservationist in theory, granted trees as property of the crown to be harvested by contractors of the crown. This ensured that colonists would not profit, and ultimately "mercantilism limited timber's markets, and monopolize its productivity" (Miller 2000, 104). Crown policies "accelerated the process of wasteful destruction" (Miller 2000, 62). The timber industry quickly failed, and the Portuguese turned to sugar, which proved a tremendous financial enterprise after failed experiments in the Mediterranean.

In Spanish and Portuguese America, land and people endured unanticipated and irreversible changes. Land which was once communally settled for subsistence underwent unanticipated modifications, a kind "ecological imperialism" with unprecedented changes in flora and fauna as a consequence of the biological conquest (Alfred Crosby, 1986). Europeans settled where indigenous people had previously thrived, and began to inhabit sparsely populated land with grazing animals and crops transplanted to the New World. Disease, resettlement, overwork, mistreatment, and enslavement were key factors in the demise of indigenous peoples; social disruption, though evidence is patchy, can be inferred from historical records (Newson 1995, 21-22). In cultural and social terms—in spite of documented resistance to changes imposed by European colonizers—indigenous communities underwent rapid demise or gradual depopulation, and survivors tolerated cultural disruptions and transformations. In Brazil, toward the end of the seventeenth century, "the genocidal assault on tribal peoples" had extended beyond the Tupi of the Northeast, and the colonial project involving the Atlantic Forest "had much intensified" (Dean 1995, 89). In New Spain, hoofed animals and the introduction of invasive plant species resulted in a disruption of climactic continuity. "The native biological regimes underwent radical changes following the introduction of Old World species, and new landscapes that we now think of as typically New World were formed" (Melville 1994, 3).

Revisiting the nineteenth century is helpful in understanding contemporary links between forms of rule, land use, and practices of development. The colonies of Latin America and the Caribbean participated in the Age of Revolutions during the early nineteenth century. The anticipation of political rupture was largely met by general uncertainty of how to rule among educated, landowning elites in place of peninsular-born Spaniards. In Mexico, José María Morelos's *Sentiments of the Nation* reveals a contradictory approach to rule, privileging social hierarchy and religion, while also leaning toward principles of equality through the abolition of slavery and the caste system. Other independence leaders displayed similar tendencies deeply rooted in the past while pondering colonialism's inherent inequalities. Simón Bolívar struggled with and debated forms of rule, theoretically preferring a republican government; yet his fear of parricide dominated his political strategy.

Following the wars of independence, new leaders struggled for political legitimacy in an atmosphere of *caudilhismo/caudillismo*, patronage, and clientelism. The events immediately following independence were generally conservative, and according to one scholar, "debates were cased exclusively in medieval and neo-scholastic terms—holding power for the legitimate king—not in liberal or liberalizing ones...[The separating movements] involved no fundamental class, racial, or social upheaval. They instead involved merely the substitution or rotation of one ruling elite for another" (Wiarda 2001, 123, 126). Despite liberalism's revolutionary connotations engaging Rousseau's social contract, sovereignty of the people and law, and abolishing corporate privilege, its uneven application and distinct interpretations sometimes led to further impoverishment of already marginalized groups. Costa contends that in Brazil, for example, statesmen adopted different strains of liberalism, one which was incompatible with slavery, and another that bolstered elite intellectual voters over all other citizens (1985). In peripheral areas, Liberal ideology—which in theory functioned through reliance upon individual action—limited political participation to a small group of men of European descent.

Making Modernity

The tensions between land use and progress were brought to the surface in the decades following independence, born out of the uncertainty of forms of rule and institutions in the newly independent regions. According to one scholar, agricultural disputes began in the mid-nineteenth century with an 1850 agricultural reform that did not take into account specific regional interests in terms of land (Kliemann 1980). Proprietors could only purchase land, which was no longer a royal grant from the crown, from the government, which had limited the size and number of plots for each person. Elites utilized their own "strategies of domination," possessing land and locking the interior into a "chain of dependency" (Kliemann 1980, 14, 12). Neither here nor there, regions far from political centers remained politically marginalized in the nineteenth century and reliant upon federal economic measures as the tension between the agrarian past and the emerging industrial capitalist future increased. Yet the encroachment of a modern, industrializing and internationalizing economy occurred slowly, particularly in largely rural and agricultural climates where issues of land had long involved notions of territory and proprietorship.

Civil war, instability, and inequalities fundamentally drawn along racial and ethnic lines marked the period of "post-colonial blues," while positivism erected barriers for women's progress (Chasteen 2006). The nineteenth century deeply hampered social, racial, ethnic, and gendered advancements, while the attempt to develop through liberalism resulted in the impoverishment of already marginalized indigenous populations. This is not to say that the masses accepted elite culture and were passive in the face of rapid social transformations toward the end of the nineteenth century. However, social changes accompanied by larger structural shifts significantly altered the ways of life.

Industrialization, immigration, and modernization characterized the second half of the nineteenth century in burgeoning urban areas, led by elites who theorized about modernity and the contribution of the individual to work. According to Burns, "the economic system that the elites obviously associated with progress was capitalism" (1980, 9). A series of economic policies aimed at generating revenue and trading manufactured goods for natural resources, Burns argues, lead to further exploitation of agrarian and mineral products for the benefit of the few. "The politicians approved foreign exploitation of the natural resources with the hope that some residue of the wealth created would enrich them and facilitate the transformation of at least the capital cities into citadels of European culture" (Burns 1980, 10). Rural workers migrated to urban areas as they gradually lost control of the lands they once worked, feeling the effects of modernity and capitalism. "The lands the folk once worked, often lands that served entire communities and constituted a fundamental factor in personal, environmental, and ecological relationships, became a commodity to be bought and sold under rapidly expanding capitalism" (Burns 1980, 11-12). In Spanish America, as in Brazil, land remained a central point of contention during the nineteenth century and into the twentieth century. Modernity and progress were umbrella terms, artificial indicators of progress that signified an abstract notion of civilization, a nebulous, uncertain goal. The tensions between federal and state governments with regard to economic growth and land use in the national period increased in the nineteenth and twentieth centuries. Patchy economic development across the country accentuated local allegiances; "regionalism and regional autonomy were more pronounced in Brazil than elsewhere, due mainly to the embryonic and uneven development of capitalist relations of production and the ongoing importance of export agriculture" (Weinstein 1982, 276).

Twentieth Century Realities

Early-twentieth-century Latin America remained entrapped by waves of political populism and nationalism reliant upon the support of the masses. With little exception, however, the popular classes were further removed from access to economic opportunity. During the latter half of the twentieth century, dictatorships headed by military juntas began in the 1960s, while enthused environmentalists continued to work clandestinely. With democratically elected leaders in place, constitutionally-led nations could potentially enact environmentally friendly politics. This positivistic anticipation of continual and upward progress over time did not result in political legislation that favored preservation, however. In reality, the complexities of local, national, and international environmental actors, agencies, and states hampered the adaptation and execution of guiding principles for protection of land and labor. Moreover, attempts to reverse deeply entrenched hierarchies often drawn along racial, ethnic, and class lines, were not received without opposition. Shifts to democracy at times resulted in hesitant or hostile attitudes toward the environment and

environmentalists, suggesting that democratic politics do not guarantee protectionism or foster social equalities.

Recently scholars began to explore and challenge past assumptions about environmental movements in developing nations, chiefly that pressure from outside international organizations has resulted in a surge of domestic concern for environmental predicaments. The scholarly tendency to focus on dominant actors over so-called peripheral nations diminishes the complexities of political processes and oversimplifies outcomes. Yet in spite of literature that locates the dawn of environmentalism across Latin America prior to the 1972 United National Conference on the Human Environment in Stockholm, the period thereafter is often characterized by stalling rather than implementation of environmental protectionism, independent of style of rule. The United Nation's first major conference on international environmental issues marked a significant crossroads in strategy and dialogue, and provided the framework for international environmental policy. With the objective of adopting a declaration consisting of twenty six components concerning development, participants attempted to raise awareness among the public and heads of state while encouraging future collaboration and regulation.

The 1972 meeting spurred reaction from governments on either side of the Amazon, including Ecuador and Brazil when both were headed by military regimes. During the 1970s, several military heads of state led Brazil, including General Emílio Garrastazú Médici (1969-1974) who claimed that environmental questions fell within the authority of each national sovereign leader; the issues were also of secondary and tertiary importance to developing nations. His successor, General Ernesto Geisel (1974-1979) initiated gradual "relaxing" (*dilatação*) followed by "opening" (*abertura*), a departure from the previous years of oppressive rule. Additional measures of opening ultimately resulted in the formation of organizational resistance in the ensuing years. The gradual opening of Brazil produced an improved political climate, particularly for previously oppressed social groups; these changes allowed for social movement protests.

On the western side of the Amazon, the United States-based Texaco Corporation commenced oil production in 1972, and Ecuador joined OPEC the following year. Briefly, profit from oil paid for subsidies for food and energy and increased available revenue to construct infrastructure. Subsequent leaders employed a discourse of profit for the benefit of the nation as a whole, while in the meantime Texaco embarked on a twenty year transformation of land and communities in the *Oriente*. "Both directly and indirectly, these oil operations tore indigenous communities apart in the northern Oriente through disease and displacement, containment, and corruption" (Sawyer 2004, 13). Ecuadorean leader Guillermo Rodríguez Lara insisted that national sovereignty was the rule when it came to natural resources.

Beginning with the sale of land in the *Oriente* to Texaco in 1972, the 1970s through the early part of the twenty-first century was a period of instability, injustice, corruption, and very little security regarding state policies or organizations. From 1972 until 1992, the Texaco Corporation was in control of oil production activities in the Ecuadorian Amazon. Texaco engaged in exploratory activities, constructed roadways and built a pipeline that runs oil from Lago Agrio to the Northwestern coastal city of Esmeraldas. According to a recent lawsuit after years of uproar, twenty years of oil production left high levels of contamination and caused disease and birth defects. Plaintiffs claim that the pollution was a deliberate act of atrocity on the part of the U.S. Corporation. "Over the course of three decades, Texaco's crude exploitation indelibly transformed the northern rain forest, strewing it with contamination from thousands of miles of seismic grids, hundreds of oil wells and open waste pits, numerous pumping stations, an oil refinery, and the bare-bones infrastructure essential for petroleum operations" (Sawyer 2004, 13). The transformation of the land and the demise of its inhabitants due to acute cancer are detailed in Joe Berlinger's 2009 documentary film *Crude*. Texaco denies responsibility for environmental contamination.

The election of Rafael Correa in late 2006 was a symbolic victory for environmentalists and organized indigenous groups in Ecuador. Correa's presidential campaign proposed a crackdown on tax evasion by the wealthy, better funding for social services like health care and education, and a foreign policy less dependent on the United States. Correa initially spoke in favor of environmental rights, but disagreements over large-scale mining recently led CONAIE (Confederation of Indigenous Nationalities of Ecuador) to accuse Correa of racist social policies. Correa's administration has made strides in several areas, including increasing the social budget and housing subsidies, and new tax laws that

target the wealthy. However, economic instability, high unemployment and festering social inequalities continue to plague his administration.

The Chevron/Texaco lawsuit has aggravated relations between the state and indigenous groups, such as CONAIE. Correa has claimed that the lawsuit is a private matter, and should be treated as such; in a 2008 interview Correa called the issue a moral one and stated to an American reporter that “always you are giving us moralist speeches, advice about economic policy, social policy, environmental policy, moral policy, etc. So we are sure that in this case you will not support these indigenous communities against a huge, a big, a very powerful transnational, ChevronTexaco” (Palast 2008). Since taking office, however, Correa has refrained from public support of environmental causes, even withdrawing the legal status of the non-governmental organization *Acción Ecológica* (Environmental Action), effectively silencing—if only temporarily—one of the region’s most widely recognized environmental groups. The group has since led mass protests again Correa’s support of mining. Yet the environmental movement, composed of indigenous and underprivileged populations, cannot overcome the major obstacle of petroleum, as it constitutes a necessary portion of Ecuador’s Gross Domestic Product. Naturally, Correa seeks to augment oil production to increase state revenue, despite evidence that the Amazon basin is in a state of “public health emergency” (San Sebastián and Hurtig 2004, 205).

In Brazil, the election of Luiz Inácio Lula da Silva in 2002 symbolized change because his party represented a local, grassroots approach to democracy. Yet under Lula, the power of the secretariat for the Amazon declined, and the expansion of cattle ranching and the burning of forests have characterized this democratic period in Brazil. Marina Silva, the environmental minister, **resigned in 2008 due to the pressures of defending the Amazon against** the power of economic interest in the region. Achieving a united national approach to environmentalism and conservationism has proved unattainable, and the issues influencing attempts to reduce deterioration run deep. Indeed, the importance of personal patronage in Brazilian politics remains, and ratified policies are not routinely enacted.

Chronologically Brazil has passed through several waves of environmentalism that include early legislation of the 1970s, redemocratization during the 1980s, and the current focus on pollution and sustainability. In the early years of democracy, some progress was made in environmentalism in Brazil. At the end of the 1990s, for example, states such as Rio Grande do Sul were at the heart of environmental activism with forward-thinking measures of protection. Yet the transition to democracy did not halt deforestation in the Amazon or prevent the rapacious activity of cattle ranching and burning of the forest. The deaths of environmental activists Chico Mendes in 1988 and Dorothy Stang in 2005 brought awareness to the issues plaguing the Amazon, though violation of the laws in place continues to hamper activism.

As in Ecuador, the theme of social justice has only recently emerged within the debate about environmentalism in Brazil. According to several scholars, the catastrophic result of mishaps in Cubatão during the last few decades resulted in heightened awareness in the state of São Paulo, though a general disinterest in how policy outcome effects social groups remains. Generally speaking, racial and social hierarchies overlap; poorer populations on the outskirts of major metropolitan centers are habitually darker-skinned and dependent upon public transport. This demographic group is also the most vulnerable, subject to land pollution that infiltrates living quarters. According to Hochstetler and Keck, during the 1980s “most environmentalists believed that they could neither solve Brazil’s environmental problems nor develop workable political coalitions in Brazil’s new democracy without confronting social issues” (2007, 110). Over the last two decades, increased awareness and activism has landed social issues in the forefront, despite the obstacles presented by coercion and weak institutions.

Fairly recent transitions to democracy in Latin America had local and international spectators anticipating momentum in environmental activism. Changes in government, however, could not undo patterns of land use and inequalities deeply entrenched during the colonial period; twentieth-century Latin America bears the stamp of colonial precedents that cannot be easily reversed. In the Amazonian regions of Ecuador and Brazil, despite the very recent establishment of democracy after political and economic instability, the commitment to environmental justice continues to center on profit rather than a pledge to social fairness. The percentages of land covered by forest in Brazil fell from 69% in 1990, to 65.6% in 2000, with another similar loss from 2000 from 2010, at 62.4% (ECLAC). In Ecuador, the decrease in forested land area was even greater, falling from 49.9% in

1990, to 42.8% in 2000, and 35.6% in 2010 (ECLAC 2010). National profit from export leading to environmental deterioration and social hierarchies continue to characterize the economies of Brazil and Ecuador. In Brazil, personal and political patronage empowers large (and often foreign-owned) companies that privilege exportation of natural resources for short-term profit. Similarly, Ecuador's Texaco debacle has not further empowered indigenous groups seeking an equitable outcome. Rather than alter past policies on environmental degradation and expose atrocities on a local level, the current leaders of Brazil and Ecuador favor a tepid approach that evades heated discussions of socio-economic disparities. Insistent that local events remain within the jurisdiction of national politics, containment has overshadowed justice.

What does this mean for the Amazon going forward? Rio de Janeiro will host the World Cup in 1914 and the Olympics in 1916; the country boasts of one of the fastest growing economies in the world, along with China and India. Yet images of Brazil show pristine beaches juxtaposed with impoverished *favela* slums and the troubled race relations highlighted in *City of God*. According to a recent report from the Council on Foreign Relations, "Brazil matters not just regionally but globally. Its decisions and actions will affect the world's economy, environment, and energy future as well as prospects for diplomacy and stability. Brazil is on the short list of countries that will most shape the twenty-first century. U.S. and Brazilian foreign policy must adjust accordingly" (2011, ix). Recognizing Brazil's global role, the report recommends that the Obama administration now fully endorse the country's bid for a seat as a permanent member of the United Nations Security Council. It argues that "a formal endorsement from the United States for Brazil would go far to overcome lingering suspicion within the Brazilian government that the U.S. commitment to a mature relationship between equals is largely rhetorical" (2011, 48). Domestically, Brazil's "inclusive growth has translated into a significant reduction of inequality, an expansion of the middle class, and a vibrant economy, all framed within a democratic context" (2011, 7). Consequently, Brazil has been able to use its economic strength to leverage a stronger position in international, commercial, and diplomatic arenas.

While many opinions concerning the tensions between development and politics remain, two general feelings predominate. While one cannot deny the growing presence of environmental organizations at home and abroad, a sense of despair remains. Gruzinski's canonical work on the mixing of Europeans and Natives argues that "finally, the threats now looming over this region of the globe add dramatic tension that makes it appear even more appealing. The Amazon is now becoming, or has already become, a lost paradise" (2004, 11). Compounding this hopelessness is the fact that research on environmentalism in Latin America is hampered by lack of access to data. Carruthers argues that "the paucity of systematic environmental and public health data in most Latin American and Caribbean countries presents an obstacle, at least to the research model familiar to US analysts" (2008, 3). Nevertheless, a growing literature on land use and preservation of the ecosystem lends urgency to our understanding of the linkages among regulation of property, economic practices, form of government, and social inequalities. In the case of the Amazon, opportunism and political injustice continue to test the relationship between democracy and environmental preservation. In fact, transitions to democracy appear to denote continuity rather than transformatio

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ENGAGING MEN IN GENDER EQUALITY PROGRAMS: THE CASE OF NICARAGUA¹

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Introduction

Over the last 30 years, feminists have made significant contributions to the international development field. Starting in the 1970s, feminist scholars and practitioners called for development institutions to include women in their programs and projects. Some of those feminists soon argued that simply adding women to the usual development processes was insufficient. Instead, they recognized the need to challenge those very processes and the ways in which they interrelate with power structures, particularly gender structures. Gender relations, rather than women, became the unit of analysis in the gender and development (GAD) approach. This shift opened the opportunity for GAD to include men in both theory and practice. Yet, in practice most “gender” programs include only women as participants, often adding to women’s burdens by increasing their productive roles, without encouraging men to relieve some of this burden. When this is the case, “gender” projects do not challenge unequal power relations or socially determined roles directly. Indeed, how can they be challenged effectively if half of the gender equation (men!) is missing?

This trend has not gone unnoticed by some feminists, development organizations, and men themselves. In the past two decades, efforts have been made to engage men as partners in GAD programming in order to promote just, equitable development for both men and women. Some women understandably fear that men’s presence in gender issues will result in the redirection of resources and power back to men, thus rolling back many feminist achievements. Meanwhile, many men still subscribe to the false notion that women’s gains are their losses—so why would they want to help empower women? In reality, however, gender equality is not a zero-sum game, and both men and women stand to benefit from its achievement. This paper adopts the perspective that men are strategic partners in the struggle toward gender equality, rather than obstacles, and that both men and women should be empowered to make their own choices and challenge assumptions about their roles in society.

From this standpoint, this paper explores how men are being engaged in gender equality programs in Nicaragua. The country presents an interesting case study because of the recent history of its women’s and civil society movements, the machismo that traditionally defines gender norms in public and private spheres, and the social and political conservatism that dominates institutions and daily life. The methodology of the project includes a review of relevant literature; individual organizations’ published materials, such as training manuals; and their websites and social media presence, where available.

Background

As the women in development (WID) approach gave way to gender and development (GAD) over the last several decades, international development scholars and practitioners began to focus on gender relations, rather than “women,” as an analytical category (Peet and Hartwick, 1999). This framework opened up a greater opportunity to truly challenge gender inequality and traditional development processes because it considers women’s productive, reproductive, and community roles, accounts for the importance of power relations, and shifts the focus away from women only (Kabeer, 1994). Because this approach focuses on the socially constructed relationships between men and women, rather than just women themselves, it follows that men would be part of the analysis. Since men (and certainly some women) are those who are most likely to benefit from and reproduce patriarchy, they also must have a role in challenging it.

The extent to which this theory has translated into practice, however, is questionable. Because its recommendations depend on significant structural changes in all areas of society, development institutions often resist or are otherwise unable to realize their full implementation (Peet and Hartwick, 1999). GAD is a heavily conceptual approach, which, at its core, questions the underlying assumptions within development institutions. As such, it does not fit in easily with practical development programs (Rathgeber, 1990). Largely, “gender” programming in development continues to be equated with women’s programming.

In recent years, however, literature and programming on masculinities, gender and development increasingly address some of these shortcomings. There is more recognition that men should not be cast as a monolithic obstacle to women's progress, and that both men *and* women should be empowered to make their own choices and challenge assumptions about their roles in society. Indeed, "empowerment, social justice, and progressive gender change can only be achieved through strategic partnerships" between men and women (Cleaver, 2002, 4). Around the world, men are being engaged (and engaging themselves) in the struggle for gender equality through programs that address gender based violence (GBV), sexual and reproductive health, fatherhood, and youth engagement, among other themes. Such work ranges from the personal to the political, but underlying the most effective activities is a fundamental, pro-feminist questioning of traditional masculinities.

Nicaragua presents an interesting setting for the variety of programming that is taking place to engage men in achieving gender equality. The country's history, from the colonial era (and perhaps even before) through the twentieth century and the post-revolutionary period has shaped Nicaraguan machismo, gender relations, and women's rights. By no means unchanging or expressed in the same way by all men, traditional Nicaraguan machismo fundamentally represents a system of power, production, and political organization in which the primacy of masculinity results in inequality between men and women in both private and public life (Lancaster, 1992; Sternberg, 2000; Welsh, 2001).

Particularly during the Sandinista revolution, women made important strides in challenging this system, as their struggle for equality became bound up with, if subordinate to, the goals of the revolution (Molyneux, 1985), and many legal rights were won. After the Sandinistas left power, however, there was a degree of "antifeminist" backlash against the revolution, and women themselves were often divided by political allegiances (Kampwirth, 2006; Cupples, 2004). Gender equality indicators in Nicaragua continue to be quite mixed at best, particularly compared with much of the Latin American region, and inequality is often exacerbated by poverty and political and social instability. Despite all of these challenges, however, women's civil society groups continue to be strong and work toward their own empowerment and the development of their communities and country. As the following demonstrates, they are not always alone in this struggle.

Emergence and Evolution of Men's Engagement in Nicaragua

Men's participation in addressing gender issues in Nicaragua has been observable since the early 1990s, after the Sandinistas left power and while the country was experiencing instability on a number of levels. In his analysis of the emergence of men's activism, Cañada (2008) attributes its start to a "confluence" of factors during that time. These include women's organizations' increasing demands that men be involved in transforming gender relations, and theoretical shifts toward the GAD approach strengthened this position. Furthermore, domestic violence as a social problem became more visible in the media and elsewhere, particularly as a result of the efforts of women's organizations. The end of the civil war, high unemployment, and political and social crises contributed to a national masculine identity crisis, while at the same time, some men became dissatisfied with the traditional model of patriarchal masculinity (Cañada, 2008).

Furthermore, in the early 1990s, civil society, including social movements and nongovernmental organizations, played an increasingly central role in addressing political, social, and economic problems (Sternberg, 2000; Welsh, 2007; Cañada, 2008). In particular, women's organizations aimed to keep gender on the national agenda as women's gains made during the previous decade were rolled back.² A few of these organizations began to incorporate the issue of masculinities into their work on gender. Complementing these efforts, "some socially conscious and committed men began to link the carrying out of domestic work and other issues related to gender equity...to human rights, social justice and integrated human development, initiating a process of reflection and analysis of their own masculinity" (Welsh, 2007, 2).³ From this context, the first organized efforts to engage men in gender issues emerged.

As the following section demonstrates, Nicaraguan men's participation in gender equality issues has evolved over time. Their engagement has mostly centered on gender-based violence (GBV), but underlying all efforts is a challenge to all harmful facets of traditional masculinity, and programs have come to address health, youth, and other issues. What started as a deeply personal and reflective movement has become more public and political. Many of the organizations that work with men and gender, either exclusively or as one of many programs, have collaborated over the

years, and now alliances are extending into the regional and international realms. Modern technology and media facilitate these alliances and publicize work on masculinities and gender on a broad scale. Challenges and gaps remain, but men's engagement to achieve gender equality has increased steadily and plays an important role in Nicaraguan civil society.

Nicaraguan Organizations' Work with Men and Gender

The following organizations and their activities are representative of the evolution of men's engagement in Nicaragua since the early 1990s. Certainly, other efforts are taking place at the grassroots level, but this paper's research methods restrict findings to those organizations that enjoy publicity through academic literature, media, and/or their own publications and websites. By all accounts, they are the primary Nicaraguan actors in the field and influence partners and other organizations locally and internationally.

Grupo de Hombres Contra la Violencia: In 1993, the first Grupo de Hombres Contra la Violencia (GHCV) formed in Managua, embodying one of the first organized efforts of men to challenge traditional masculinity. The GHCV enjoyed the support of feminists, was founded primarily by young men working with NGOs, and at least 9 more groups formed throughout the country (Welsh, 2007; Cañada, 2008). The GHCVs worked toward changing machista values, attitudes and behaviors with the objective of building gender relations based on justice and equality (Cañada, 2008). Primarily, the groups served as a space for men's critical self-reflection, but their roles expanded to include service provision for other men and a platform for political activism. The GHCVs continued to work for at least a decade.

While the groups were dedicated early on to men's collective reflection and internal capacity building, they did engage in other activities through collaboration with other organizations, including some of those discussed below (Cañada, 2008). The groups began to offer training, counseling, and other services to men throughout Nicaragua, including in marginalized neighborhoods. They had a good, working relationship with the Red de Mujeres Contra la Violencia and actively participated in some of their policy campaigns to reform domestic violence laws. The GHCVs also worked with partners on research projects exploring masculine attitudes and behaviors and evaluating programs, as facilitators in workshops, and on public campaigns against GBV (Welsh, 2007; Cañada, 2008). Overall, the GHCVs represented an important first step for men's collective action and self-recognition of their roles in ending harmful aspects of traditional masculinities.

CANTERA: Nicaragua's Centro de Comunicación y Educación Popular (CANTERA) is a feminist NGO founded in 1988 that places women's welfare, human rights, and integrated development at the center of its mission and programming (Welsh, 2001). Its work with women combines popular education and gender analysis to focus on raising women's awareness of their social position and promote their empowerment. CANTERA's work with men on gender began in 1994, after women in the organization challenged men to analyze masculinity and its role in gender and other structures, like ageism, racism, and homophobia (Welsh, 2007, 3). Their popular education methodology is based on the organization's belief that people's behavior is learned, and therefore can be "unlearned" through self-reflection, and it encourages people to "take responsibility for their own development" (Welsh, 2001, 23). From a theoretical standpoint, CANTERA's work on gender and masculinity seeks to address women's practical and strategic gender needs, but over time it also took on the idea that men, too, would benefit from changes in traditional masculinity (Welsh, 2001, 24).

CANTERA's work with men began with the first National Conference of Men Against Violence in 1994, in which 41 men from all over Nicaragua participated in a one-day workshop to address two issues: the social construction of masculinity and the consequences of machismo for women, children, and men (Welsh, 2001, 25). In the following years, CANTERA developed courses on masculinity and popular education, through which they target national and local community development NGO employees, employees of government agencies, rural men and extension workers, and young men involved in the work of local NGOs (Welsh, 2001). The series of workshops indicates the issue areas in which CANTERA works: male identities; gender, power, and violence; and forging just relationships, the latter of which takes place in a mixed-sex setting (CANTERA, 2010). Since developing these courses from 1995 to 1999, CANTERA has carried out an impact study of the workshops with participant men and with women, has systematized the workshop materials for replication by other organizations and in other countries, and continues to conduct the courses itself (Welsh, 2001; CANTERA, 2010).

Puntos de Encuentro: Another feminist Nicaraguan NGO that played an early and important role in the masculinities and gender field is Puntos de Encuentro (Puntos). Founded in 1991, Puntos recognizes the similarities among women and youth in terms of their subordinate position in power hierarchies within the family and other social institutions, and aims to encourage the rights and participation of both groups in all aspects of life (Puntos, 2010). In particular, Puntos uses various forms of media to influence public opinion and effect political and social change. These include the dissemination of a feminist magazine to hundreds of women's organizations; television, radio and Internet programming directed at youth; workshops and seminars; and sensitization activities like public conferences, debates, and cultural campaigns (Puntos, 2010).

Puntos' work with men began in the mid-1990s with a research project on masculinities and violence. The project, *Nadando contra corriente*, engaged partner organizations like GHCV and CANTERA to interview men and facilitate workshops to analyze the experiences of Nicaraguan men who do not conform to traditional or violent forms of masculinity (Montoya, 1998). The lessons of this report shaped a national media campaign to combat GBV in the wake of Hurricane Mitch in 1998 (Welsh, 2007). Puntos has also published workshop manuals, including one for working with mixed-sex groups, and a more recent one aimed at youth on issues of machismo, HIV/AIDS, and sexual abuse (Puntos, 1997 and 2005, respectively). The latter workshop comprises part of Puntos' current campaign, "Somos Diferentes Somos Iguales," along with a television series, "Sexto Sentido," that broadcasts nationally and regionally and addresses youth, gender, violence, and other pressing social issues (Puntos, 2010).

Centro de Información y Servicios de Asesoría de Salud: Around the same time that CANTERA and Puntos de Encuentro began to work with men, the Centro de Información y Servicios de Asesoría de Salud (CISAS) did the same, primarily in response to women's demands to include men in programs addressing reproductive and sexual health. CISAS, a rights-based Nicaraguan health NGO, was founded in 1983 and uses popular education and social communication methodologies to carry out its activities in community health (CISAS, 2010). CISAS engages in community workshops, public campaigns, policy advocacy, and national and international alliances to promote rights to health, including issues of gender equality.

Starting in 1996, CISAS carried out survey research with men to provide them with information they could use to understand their own behaviors and attitudes, and to raise awareness of and challenge machismo and harmful power relationships, particularly regarding sexual relationships (Sternberg, 2000). In conjunction with partners, it has also implemented training and forums with youth and children, such as a recent children's workshop analyzing men's and women's socially assigned roles (CISAS, 2010). Other recent activities include CISAS youth health promoters' participation the national retreat "Mujeres y hombres unidos trabajando por un futuro libre de violencia, machismo, VIH y Sida" and a training of health service providers to promote HIV/AIDS prevention from the perspective of gender, age, and human rights (CISAS, 2010). Thus, unlike the more generalist approach of CANTERA and Puntos, CISAS focuses specifically on community health issues. Like the above organizations, a fundamental questioning of masculinities and gender roles underlies its activities.

Asociación de Hombres Contra La Violencia: By the end of the 1990s, more and more organizations began to recognize the importance of including masculinities in their strategies to address gender issues. During this time, efforts started to move beyond the personal level of consciousness-raising toward having a political agenda, as well. From its founding in 2000, Asociación de Hombres Contra La Violencia (AHCV) carried out community-based interventions with men and women to raise awareness about gender, masculinities, violence, health, fatherhood, and related topics. Over time, it also came to operate from the standpoint that the personal is political; that is, it moved beyond promoting individual changes in men to encouraging their political engagement. AHCV recognizes the need develop its own political agenda, in addition to supporting the women's movement, and its more than 35 organized groups around the country provide a solid base that can be mobilized easily (Welsh, 2007, 11-12).

As a result of AHCV's role on the personal and political levels, its methodologies range widely. At the community level, it helps to establish local men's groups and networks against violence, and has adapted CANTERA's popular education training manuals to work with local men and train facilitators (Welsh, 2007). In 2003, in partnership with the International Labor Organization, it developed a handbook for men migrating from Nicaragua to Costa Rica, which encourages men to

consider issues of masculinity, relationships, fatherhood, and gender equality, particularly in the context of migration (Avellán, 2003). AHCV's more public efforts include public awareness campaigns, cultural activities, talks in schools and churches, and advocacy and lobbying on public policy issues such as GBV, sexual exploitation of women and children, and services for men convicted of GBV offenses (Welsh, 2007). Thus, while challenges remain, AHCV has taken necessary early steps toward politicizing the men and gender movement.

REDMAS: The most recently formed organization exemplifies the collaboration and alliance building that characterizes men's engagement in gender issues in Nicaragua. Red de Masculinidad por la Igualdad de Género (REDMAS) began in 2007 as a result of a workshop organized by several other Nicaraguan NGOs, including Puntos de Encuentro and AHCV. The network currently comprises 20 organizations, including women's and youth groups, community development organizations, and men's organizations. REDMAS works to strengthen the existing work on masculinity with a gender and generational focus; works with children and adolescents; shares experiences with other organizations; and aims to be a space for national and international reference for work on masculinity and gender (REDMAS, 2010). In addition to being a network itself within Nicaragua, REDMAS is also a member of MenEngage, the global alliance of NGOs and UN agencies that engages men and boys in achieving gender equality.

Like the above organizations, REDMAS engages in training and education activities. In 2008 it implemented its first collaborative project, training students and teachers about the physical and sexual violence that children and adolescents suffer, as well as their rights. It has collaborated with Puntos de Encuentro to produce materials about machismo and social pressures for youth, and in 2008 systematized its training materials on gender and masculinity aimed at children, adolescents, and young adults (REDMAS, 2008; 2010). Most recently, REDMAS began to carry out its first educational campaign directed at boys between the ages of 10 and 15. The program engages participants by proposing that "Ser machista no es balurde" ("machismo isn't cool"), and contends that males can positively challenge the pressure they feel to engage in risky or violent sexual behavior just to demonstrate that they are men (REDMAS, 2010; Silva, 2010). Finally, like Puntos de Encuentro's Sexto Sentido project, REDMAS takes advantage of new social media: both projects have ample Internet presence, including pages on the Facebook networking site. Use of these media potentially enhances the organization's audience within and beyond Nicaragua's borders.

Discussion: Trends, Challenges and Opportunities

Nicaragua is an important case in the discussion of men's engagement to address gender inequality. Efforts there are broad and tend to mirror those found around the world in terms of issue areas and theoretical approaches. Like similar movements around the world, these Nicaraguan NGOs largely began by addressing the overtly physical manifestation of harmful masculinity: gender based violence. Over time, they have integrated the other major issues, including reproductive and sexual health and relationships, fatherhood, and youth engagement. Furthermore, none of the organizations discussed here comes from outside the country. While they may count on the support of outside funding and networking, that they are all Nicaraguan is important in ensuring the cultural appropriateness and sustainability of their efforts. As such, there is less risk of imposing some preconceived notion of gender identity. Coupled with the popular education approach adopted by most these programs, this enables men to reflect on their identity as *Nicaraguan* men and use their very personal knowledge of the particular structures that constrain them to question and redefine this identity.

In terms of the theory behind Nicaraguan efforts, some parallels can be drawn with the major approaches in the masculinities, gender and development field. For example, the emergence of Nicaraguan men's engagement took place in the context of a crisis of masculinity brought on by the end of Sandinista rule and high economic, political, and social instability, as well as women's increased economic participation. Cleaver (2002) identifies such a crisis as a major motivation to involve men in gender and development programs, in part to ameliorate potential or real backlash on the part of men who feel threatened by fundamental challenges to their role in society. In the Nicaragua of the early 1990s, such amelioration was called for in response to the anti-feminist backlash and rise in concerns about GBV noted above. Furthermore, all of the above organizations' approaches reflect a fusion of theories whose ultimate premise is that human development and significant changes in gender relationships can only be achieved through strategic partnerships between men and women, and that

all genders should be empowered to make their own choices and challenge cultural constraints on their roles in society.

The challenges and opportunities posed by this case study are discussed collectively here. First, similar to global trends, projects that tackle issues of *livelihoods and economic opportunity* are largely missing from the Nicaraguan case. This is curious considering the fact that increasing women's economic opportunities is both a prominent strategy of development organizations, and also a source of strain on gender relationships at the household level. Perhaps by challenging traditional assumptions about men's roles, through fatherhood programming or popular education, programs like those of CANTERA or REDMAS might indirectly affect household relationships concerning the economic division of labor. For example, a male participant who changes his attitudes toward accepting his partner's increased role as an income earner may avoid the violent or otherwise resentful behavior that has been shown to result from women's participation in microcredit projects. Welsh (2007) also notes that a good intervention point can be based on changes that are already taking place, such as the case of young men who are necessarily starting to take on domestic responsibilities when their partners work outside the home.

However, there is no reason why programming should not move beyond indirectly addressing men's and women's economic roles. Both men and women stand to benefit from expanded options for securing their livelihoods, and evidence shows that economic stress is a key factor in men's use of violence against their partner, which in itself is a crucial motivation for relieving that stress for both men and women (Barker, 2010).

Yet in livelihood programming, there is a tendency to rely on the assumption that altruistic women are more likely than men to use increased income to benefit their families, without then addressing necessary changes in domestic responsibilities. As a result, women often face increased pressures on their time, while men are not engaged to help balance public and private labor roles. Rather than circumvent men in these programs, organizations should (and certainly some do) strive to include both men and women as participants, and to incorporate gender training to tackle the issues of masculinity that the above organizations have become so adept at addressing. If the economic aspect of development continues to be an important focus in the field, steps must be taken to integrate all genders and explicitly address traditional divisions of labor.

Second, while some of these Nicaraguan organizations engage in *monitoring and evaluation*, there remains an opportunity for enhanced study of the links between their programs and gender equality indicators. Examples of evaluation efforts are not absent. CANTERA's 1998 study, "Hacia una nueva masculinidad," surveyed both male participants and their female partners in order to gauge the impact of its courses, although it lacked baseline information (Welsh, 2001, 38-48).⁴ Puntos de Encuentro carried out a participatory evaluation of its anti-GBV campaign after Hurricane Mitch, which assessed men's awareness of the campaign (Welsh, 2007, 4). Finally, AHCV's training program for men includes testing before and after the workshops to monitor changes in men's attitudes and behaviors, along with a monitoring and evaluation system of the training process and community intervention strategy as a whole (Welsh, 2007).

Of course, it is necessary and most feasible to assess individual changes among participants. If the goal of such programs is to achieve gender equality on a broader scale, however, and effect society-level changes, there is a need to assess possible links between gender programs that involve men and broader gender equality outcomes in Nicaragua. For example, the targeted focus on GBV and reproductive health begs the question of the impact on rates of domestic and sexual violence and women's health outcomes at local, regional, and even national levels. Personal reflection and changes in individual attitudes are a necessary first part of the process of men's engagement and should be measured. In addition, though, after 20 years of such programming, there is a need to assess the extent to which it is influencing the very power structures and symptoms requiring their existence in the first place.

Third, one of the major challenges for men's engagement in gender issues is how to move from *the personal to the political*. As noted above, organizations like AHCV and Puntos de Encuentro engage in public awareness campaigns and policy advocacy. They certainly understand the need for changes at policy and public levels to complement changes that are taking place on the ground among men and community organizations. However, there remains a need, and thus an opportunity, to link the personal and the political, and to move some of this work beyond the NGO world. Male respondents in CANTERA's 1998 impact study identified several obstacles to change, including the lack

of gender policies in the workplace to promote and consolidate changes (Welsh, 2001, 50). These might include things like paternity leave or equal pay policies, both of which could facilitate changes in men's and women's roles, and both of which could potentially be influenced by changes in businesses' policies and as high up as the national legal level.

Related to this concern is the challenge of changing powerful and historically patriarchal institutions in Nicaragua, and not just circumventing them. Most likely, the men who participate in the above programs do so because they already possess some pro-feminist ideas or have been exposed to the organizations that implement them. Welsh (2007) notes that many members of the AHCV have gradually withdrawn themselves from spaces traditionally dominated by men, like political parties, the Catholic Church, and labor unions. He expresses the problem that this poses:

"However, if the fundamental structure of patriarchal society and its institutions is to be challenged and changed, it is imperative that those of us who have already begun to 'swim against the tide' in our homes, workplaces and communities, also start to influence, in some real way, the patriarchal organisational cultures of the 'political' institutions we have abandoned" (Welsh, 2007, 12). Thus, the challenge for these organizations is to determine how to reach those men who may not be prone to participating in gender programming, and to work with the country's institutions, rather than against them. The patriarchal figures who dominate Nicaraguan politics and powerful institutions like the Catholic Church pose particular obstacles. For example, Daniel Ortega was re-elected president in 2006, enjoys a 45% approval rating⁵, and was never prosecuted for his stepdaughter's severe accusations of sexual abuse in 1998, a claim that was publicly supported by organizations like AHCV and GHCV (Welsh, 2007; Schmidt, 2010).

Finally, the findings raise the questions of if, how, and when to *integrate men's and women's efforts* in achieving gender equality. The very premise of this paper is that both men and women must be involved in the GAD approach to development, and they both stand to benefit from gender equality. Since gender relations are the analytical unit, it only seems logical that all genders would be part of GAD practice. Here we have seen that men most certainly are involved in gender equality issues, which is a positive and reassuring sign. However, men are often targeted by programming in isolation from women, particularly at early stages of *concientización*. The case of Nicaragua does provide some insight into how women and men might be brought together.

For instance, the above organizations can and do take advantage of close alliances with the Nicaraguan women's movement, advocating jointly for progressive policy changes. Organizations like CANTERA and Puntos de Encuentro were founded first and foremost as feminist NGOs and largely run by women who later encouraged the inclusion of a focus on men and masculinities. Some programs integrate male and female participants, especially those that work with children and youth. For example, Puntos' programming is largely aimed at mixed-sex groups of young people (Puntos, 1997; 2005). CISAS (2010) trains male and female health promoters in gender analysis, and its other programming for children and adults alike takes place in mixed-sex forums and retreats. CANTERA (2010) runs separate series of workshops for men and women on gender equality, but then combines the participants in the final workshop on "forming just relationships." For most of these organizations, their early work necessarily targeted only men as participants in survey research and workshops, in order to plant the seed for thinking about gender and masculinities in a conscious and analytical way. Over time, they have demonstrated an effort to engage men and women collectively, although some challenges still remain.

Both the Nicaraguan case study and the experiences of organizations around the world illustrate some of the challenges or obstacles to combining men's and women's efforts in achieving gender equality. Male respondents in CANTERA's 1998 impact study noted that one of the major obstacles to systemic changes in men's behavior is that many women are skeptical that men can change (Welsh, 2007, 50). Other women worry that men's participation in gender issues will take away from women's gains and resources directed toward their own programming (Cleaver, 2002). Meanwhile, some men still assume that women's gains are their losses. Furthermore, it has taken time for space to open up for work on masculinities and gender; that space is small but significant. A challenge in moving ahead lies in figuring out how to widen those spaces, and in determining the extent to which women and men can genuinely work together, not just from within their respective organizations. Both men and women are instrumental in perpetuating unequal gender roles, so both must work together to challenge them.

Men and women taking part in concerted, progressive efforts to achieve gender equality and social justice must forget the false notion that equality is a zero sum game. Women's gains do not equal men's losses, and men's participation does not have to equal their cooptation of the gender agenda.

Conclusion

This paper has contended that men's engagement is critical to the achievement of gender equality. The case of Nicaragua demonstrates that a range of nongovernmental organizations have undertaken work in the field of masculinities and gender since the early 1990s. They tackle issues of machismo, violence, sexual relationships and health, and other gender equality issues in work with men, children, youth, and at times, women. Their diverse methodologies include popular education, public awareness campaigns, action research, and political advocacy. Much of their work began by focusing on personal reflection and individual changes among men. Over time, however, several of the organizations profiled here have taken steps toward making their work more public and political in order to influence a broader cultural shift in Nicaraguan, where machismo and social conservatism still largely dominate private and public institutions.

From the findings of the Nicaraguan case study emerge a number of important lessons for this field. First, there is a lack of programming to address livelihoods and economic opportunity. Rather than resting on gendered assumptions about who handles household income more responsibly, livelihood projects should engage both men and women and explicitly deconstruct those norms. Second, evaluation of these programs should continue to assess changes in participants' attitudes and behaviors, but it should also move toward linking them to broader gender equality indicators; this also presents an opportunity for further research. Third, there remains a need to consolidate a political agenda and move these issues beyond the NGO world. While certainly a challenge, men and women must work *with* patriarchal institutions in order to change them, rather than working around them. Finally, in Nicaragua men and women have certainly partnered to advocate for progressive policies, and as participants in some programming. Now and in the future, their collaboration must strengthen to ensure that they address inequality jointly, not just from their respective organizations.

Overall, these Nicaraguan NGOs are taking positive, pro-feminist steps toward fundamentally challenging traditional masculinities, thereby setting the stage for more just and equitable relationships between men and women. To be sure, gender and development practice must still focus on women's unique needs and assets, and women must lead the way in expressing what these are and challenging the structures that so often oppress them. Where physical and structural violence threaten women's health, welfare and lives, urgent interventions must protect and empower them. But that does not mean we should ignore men or cast them as a monolithic, unchangeable obstacle.

Men's engagement is just one of many strategies for achieving gender equality in the development process, but it is an important one. Programs like those in Nicaragua have the potential to empower both men *and* women to exercise their agency in the face of structural constraints on their identities, attitudes, and behaviors. To complement this, development institutions and professionals can learn from the Nicaraguan experience. Where they have not already, they must reconsider the way they think about gender in the planning and implementation of their projects. Gender equality is not just about women. It is about ensuring just, meaningful relationships for all individuals and groups so that they may exercise their full capabilities in achieving their own human development.

Notes

¹ Based on a paper presented at the Mid-Atlantic Council of Latin American Studies 32nd Annual Conference at the University of Pittsburgh, March 17-19, 2011.

² For example: Kampwirth (2006) argues that an "antifeminist backlash" occurred in response to the Sandinista revolution and its aftermath, and to global trends such as the success of feminist perspectives within international development agencies. The debate about legal reform surrounding abortion and the eventual outlaw of abortion, even in cases when a woman's life is at risk, in 2006 might also be interpreted as symbolic of a challenge to women's rights in the post-civil war era (Heumann, 2007; BBC, 2006).

³ Patrick Welsh is a founding member of the Asociación de Hombres Contra la Violencia who has been active developing participatory methodologies for gender training and awareness-raising with men in Nicaragua.

⁴ The study, which included the survey questionnaires, reunions of male participants in the years following their workshops and consultations with women, found generally positive changes in men's attitudes and behaviors vis-à-vis personal, conjugal, family, work and community relationships as a result of participation in CANTERA's courses.

⁵ At time of writing.

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CIRCULATION OF THE HIGHLY QUALIFIED WORKFORCE IN LATIN AMERICA: A FOCUS ON THE MEXICAN DIASPORA

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Introduction to Professional Style Migration

Highly qualified migration (HQM) has been on the political agenda since the 1970s. Its importance caused great debate in opportunities such as the World Economic Forum in 2006 (Davos), which was also unofficially referred to as the war for talent. In that opportunity, human talent was declared essential for the acquisition and generation of new knowledge.

Flows of international migration are constantly growing. About 3% of the current world population is foreigners. We live in a globalized, "runaway world" (Nnaemeka 2007, p. 127), characterized by the movement of individuals, capital and technologies.

Nevertheless, these movements are still caused by economic shortage. Scott (1999 cit. en Hong 2006) studies this "international exchange" of people, knowledge and institutions around the world. While rich countries tend to send financial capital and technological knowledge to the poor (direct transfer of technology), the former send human capital, sometimes highly qualified (reverse technology transfer), which affects the countries of origin through remittances. Additionally, there are flows of knowledge; while some developing countries may be considered as a reserve of traditional knowledge, the developed ones export theories which end in the unification of political practices and views about the world, such as in the case of political realism or neorealism.

From the same perspective which divides the world into developed and undeveloped countries, Zolberg (in Jaffrelot & Lequesne, p. 202) appreciates that no migration is voluntary; the majority of the supposed voluntary migrations are caused by poverty. This is quite a strong opinion as it implicitly rejects the idea that people would circulate between countries at their own will, but it definitely contextualizes the circulation of professionals between developed and developing countries. Bartra (2010) thinks that if everybody had the opportunities of decent work and of a quality lifestyle in the country of origin, this would guarantee the right to stay in our own country, if one prefers to do so. He uses the metaphor of the "right of no emigration" to explain migration from less developed to more developed countries.

This paper assumes that HQM is a type of lifestyle migration (Benson and O'Reilly 2009), and implies the search for personal fulfillment by individuals with a certain degree of mobility. The migration of professionals (here a synonym for HQM) is seen as a process of lifestyle migration, or recreation, a search for a better life and opportunities of personal and professional development. This means that the migration of professionals does not always imply a brain drain for the country of origin and that people do not necessarily leave countries because they are forced to. They sometimes do it because they like to live abroad or because they have the possibility to choose where they live, along with various other reasons such as family reunion or studies.

This essay has two main objectives: a) to explain the theoretical dimension of diaspora policies, in the world and in Latin America; b) to offer a case study of the Mexican diaspora, based on an original survey (Tigau 2010b). It concludes with some recommendations on diaspora policies.

Political Models for Highly Qualified Diasporas

In the knowledge – based economy, companies and states need to search, attract, recruit and retain human talent from everywhere in order to maintain their competitiveness (Tung 2008). This results in the need to use the international talents who come from abroad but also to keep in touch with the national ones who could economically help their country of origin. New public policies for the diaspora emerge with the aim of communication, organization and innovation.¹

We may identify three types of public policies for the qualified diasporas: nationalist, internationalist and transnationalist, which correspond to different theoretical perspectives on how to manage talents abroad. (see table 1). From the nationalist perspective, professionals are considered as expensive human capital which must not be lost through migration, but returned to the country or origin. In this view, the migration of professionals leads to brain drain. The corresponding policies are

return and repatriation.

The internationalists criticize this type of conceptualization, because it suggests the loss of a vital resource without compensation for the country of origin (Adams 1989 in Licea de Arenas et al. 2001). Internationalists claim that migration is not always one – way, but it can result in the circulation of people across borders. While human capital may enjoy the freedom to look for its maximal retribution, it tends to flow towards regions where professionals may receive more attention and benefit more economically. According to this view, the individual in question as well as the country of destination benefits from talents’ migration, while the country of origin remains potentially unaffected. The policy corresponding to this view is one of “laissez-faire” (let be), that is, no intervention in the mobility of people (Adams, 1968, p.28-29).

Table 1. Evolution of Migration Policies for Professionals

Model/indicator	Concept	Perception of the professionals	Public policiesMain perspective	
Nationalist	Brain drain vs. brain gain	Human and social capital	Restriction of movements Taxes and remittances Repatriation	Losses and problems
Internationalist	Circulation and benefits	Talent	Repatriation and networks. Work for the country from abroad	Benefits
Transnationalist	Talent exchanges, nomadism	Free person	International cooperation: talent mobility concerns various countries	Freedom to choose

Source: Tigau (2010a, p. 19).

Internationalists therefore use the concept of brain circulation (Cervantes & Guellec, 2002), that refers to the cycle which begins when the migrant travels abroad particularly for studies, stays there to work, and then returns to his or her country of destination with the experience and knowledge obtained abroad, and sometimes, with financial capital.

The third theoretical perspective is transnationalism and it responds to the movements of people and knowledge in globalization. In the transnationalist model, talents find themselves placed in an international reality where exchanges are more common. Brain exchange is the basic concept in this theoretical model for the migration of professionals, which describes the flows of experiences and knowledge between countries of origin and countries of destination, for mutual benefit. This is a new level above the internationalist theoretical perspective, since people actually build their lives across borders, in a more cosmopolitan way. In this new globalized context, professionals get more than one nationality, they work in transnational companies and they are more free to choose where they live and work.

In the transnationalist perspective, governments actually get to use their own diasporas for image promotion or economic development and they may design policies for talent attraction from abroad. As such, governments need to create policies to organize their diasporas that stimulate the cooperation and organization. Brain gain is not a hazardous phenomenon, but the result of planning efforts by governments that design attraction policies. Diasporas with medium and high skills are phenomena of complex circulation (Meyer, p. 251), which means: political and economic pressure;

social networks and organization of talent attraction. More than any other type of migration, the professional one may stimulate the development of the country of origin.

The effects of co-development (Gabas 2009) are business investment and market exchanges, being the only practice of solidarity between migrants and their country of origin. Esman (2009, p. 145) identifies the following main objectives of the public policies for the diasporas:

1. Facilitate their adaptation towards the governmental preferences, separate status or hybrid policy (political integration combined with social and cultural autonomy) and
2. Prevent and limit the intensity of ethnical conflict.

Apart from quantity, educational capital (studies) and the quality of the diaspora, that it to say, its level of organization, are also important. Esman (ibid.) further distinguishes between labour and business diasporas. While the first ones are exploited in the country of destination, the second ones are active actors in the elaboration of politics and actions.

Tendencies in the Migration of Latin American Professionals

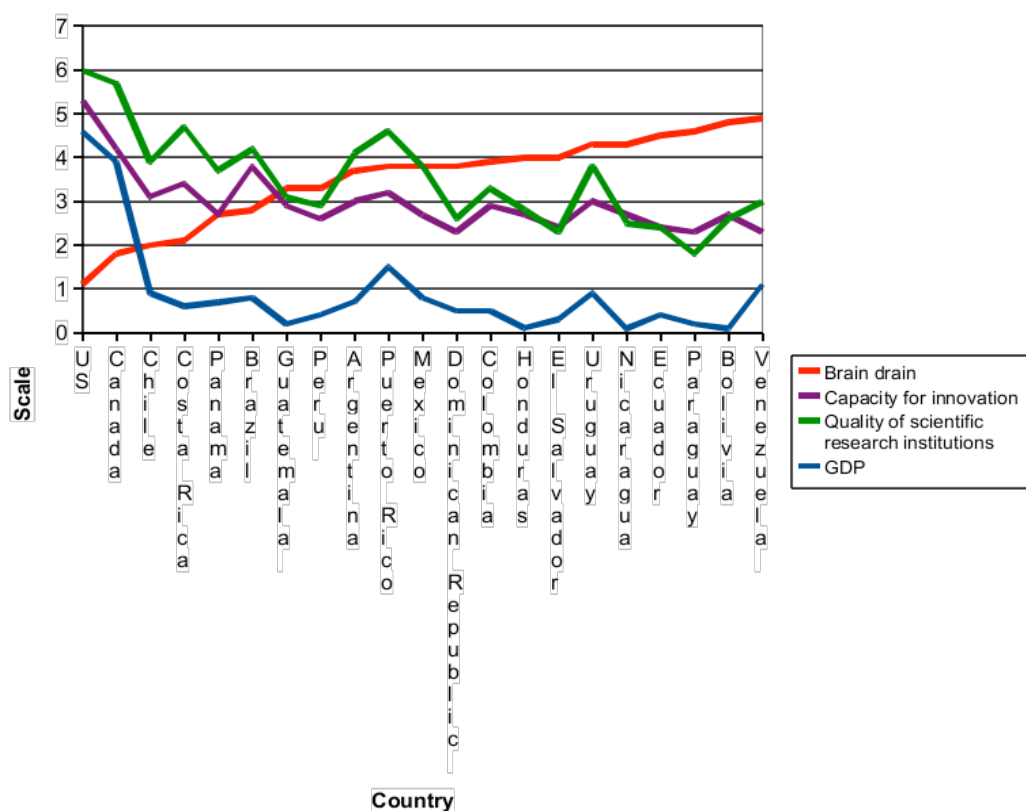
Some causes for the migration of Latin American professionals have been underemployment, bad economic conditions, insecurity and political reasons. The preferred destinations are the US and Europe (particularly Spain and France). The migration of professionals directly correlates to such factors as the capacity for innovation, quality of scientific research institutions and GDP, among others (see figure 1).

Public policies for the diasporas respond to the reality that LA countries may not offer excellent conditions of repatriation for all its professionals. Latin American countries started with programs of repatriation ("the nationalist model") in the 1970s and advanced towards policies of networking ("internationalist view") in the 1990s. From this perspective, they are good models of planning, considering their adaptation to the national political and economic conditions, especially in the case of Colombia.²

Among the professionals, special attention is given to scientists, as they are believed to stimulate innovation more than other groups such as sportsmen or businessmen.

Figure 1. Correlations between brain drain, capacity for innovation, quality of scientific research institutions and GDP per capita in the Americas

Source: based on data from The World Economic Forum (2010). The Global Competitiveness Report 2010–2011. Geneva: SRO-Kundig



Engineers, finance workers and doctors, highly mobile professionals, are also supported by the diaspora policies. Artists receive no special attention whatsoever.

Migration in Latin America is oftentimes a release mechanism ("válvula de escape", Pellegrino, 2001), as the country does not have sufficient resources to employ its own professionals, and therefore it is a solution to underemployment and social resentment. From this perspective, postdoctoral positions abroad are highly used as a channel for circular migration. This may lead to special situations where individuals postpone their professional life taking postdoctoral positions abroad. They are not completely accepted in the country of destination and they cannot integrate to the labour market of their country of origin, due to over qualification. Rocco-Cuzzi (1999) observes that postdoctoral studies constitute a type of transhumance of scientists who return every two years to Europe or the US, as they do not find a permanent job in their own country. In this way, they keep accumulating several postdoctoral studies.

One of the good outcomes of Latin American migration of professionals has been its role as an image promoter for their home countries. This is particularly true in the case of Argentina, where scientists and sportsmen are analyzed together and considered as talents. In Argentinian literature, there is also a tendency towards personalization of the debate, due to the role that certain personalities such as Nobel Prizes may have in promoting their country abroad.³

2. VIA NETWORKING: THE MEXICAN CASE

2.1 Background

The estimated number of Mexican professionals abroad varies between 575 thousand (Áviles 2009) and 923 thousand (Hillel 2008). When compared to the total number of migrants, these figures seem less high than other OECD countries. However, Mexico is the fourth exporter of professional talent in the world, after Great Britain (1.441 billion), Philippines (1.126) and India (1.037), according to Hillel.

In response to this reality, the Mexican Government launched a Program of Retainment and Repatriation of Mexican Researchers (1991), created by the National Council for Science and Technology (CONACYT). 1859 researchers were repatriated in this period, the equivalent of a half of the scholarship winners and a third part of the National System of Researchers in 1999 (Tejada & Bolay, 2005). The majority of the repatriated professionals returned to Mexico from: the US (40%); France (15%); UK (13%); Spain (9%); Canada and Germany (5% each). The repatriation program had difficulties such as the lack of academic positions. Some criticized Mexican polices as outdated and inadaptable to international economic conditions (Tejada & Bolay *ibid.*)

A new Program for Students Mobility in North America (PROMESAN) was launched in 1995, involving 348 academic institutions. This initiative was financed by the Ministry of Education in Mexico, the Fund for the Improvement of Postsecondary Education (FIPSE) in the US and the Human Resources and Skills Development Canada. PROMESAN worked to validate studies and form trinational work teams, networks of research and innovation between Mexico, US and Canada.

In 2002, Mexico initiated its first programs for networking with the diaspora. The Special Program for Science and Technology (PECYT) created that year stipulates the intention of the government to cooperate with with Mexicans abroad. In 2003, the Institute of Mexicans Abroad was created, now in charge of the Network of Mexican Talents Abroad (RTM, for its Spanish abbreviation). The project also benefited from financial aid from the Mexico – US Foundation (FUMEC).

During its six years of existence, the Network of Mexican Talents Abroad has been the main effort of the Mexican government together with Mexican citizens abroad, companies and universities. RTM now functions based on local associations named "chapters", distributed as follows: 5 in the US (Los Angeles, Orange County, Houston, Detroit and Silicon Valley); 3 in Canada (Ottawa, Montreal and Toronto), and 2 in Europe (UK and Germany). These local chapters organize communities of Mexicans who wish to cooperate with Mexican institutions, mainly in technological areas. The link with Mexico is established through national contact points, that is, Mexican institutions that receive financial aid when they establish bilateral projects with the help of the diaspora. (see table 2).

Table 2. National Contact Points for Network of Mexican Talents Abroad

SECTORES	PNC's
1. International Cooperation for Development	Institute for High Studies of Monterrey (ITESM - Campus Guadalajara)
2. Technologies of Information and Communication	ITESM (Campus Estado de Mexico)
3. Automobile Industry	Mexico – US Foundation (FUMEC)
4. Nanotechnology and New Materials	Center for Research in Advanced Materials
5. Hydrocarbons and Alternative Energy	Institute for Electric Research
6. Environment and Climate Change	Mexican Institute for the Technology of Water
7. Food, Agriculture, Fishery and Biotechnology	University Program of Food (UNAM and ITESM (Campus Irapuato)

Source: Network of Mexican Talents Abroad, www.redtalentos.gob.mx, accessed February 15, 2011

2.2 Method

To determine the current characteristics of the Mexican professionals abroad, a survey was designed (Tigau 2010b), considering the following aspects: 1) personal data; 2) reasons for migration; 3) diagnosis over Mexico; 4) integration to the country of residence; 5) interaction with Mexico and 6) final comments on their current situation (open answer).⁴ One of the objectives of this research is to reflect upon the level of professional and personal satisfaction of the Mexican talents abroad. How happy are Mexican professionals who live abroad? Would they return to Mexico? Did they abandon their country of origin due to frustrated expectancies?

Despite the existence of various governmental programs for the diaspora, accurate statistical data on the Mexican professionals abroad is not currently available, as access to this population appears rather difficult.⁵ An initial group of professionals was first identified using the data bases of the Institute for Mexicans Abroad, and afterwards the invitation was extended using personal and labour networks, through the “snowball method” (Schutt 2006).⁶

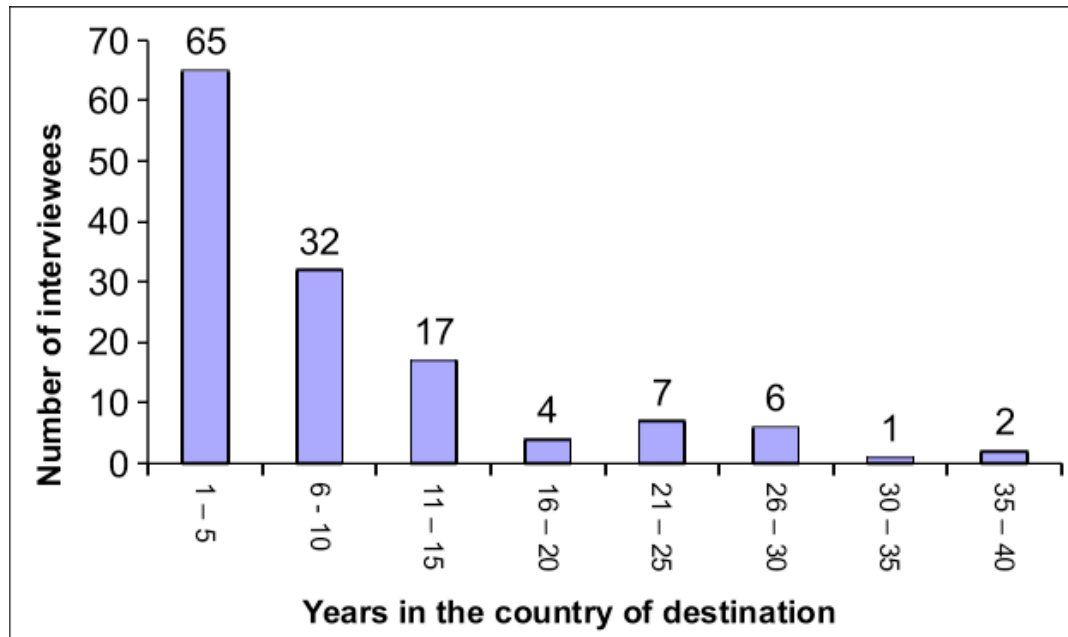
The reliability and margin of error of the sample were verified through quantifiable indicators such as age, participation in Mexican associations abroad and years in the country of residence. These data may help calculate the standard and the confidence intervals when we compare with other studies on the distribution of the Mexican diaspora.

Several open questions were included, with the purpose of maximizing interaction with the respondents. Answers to all questions were optional and respondents could keep their anonymity. The survey received 137 answers, considered enough for its variation, even though the sample may not be sufficient to statistically represent the overall population of Mexicans abroad. At this point, answers to key questions such as reasons for migration, main problems in Mexico, opinions on S&T, review of the Mexican press were stabilized (repeated) to infer a sufficient work hypothesis.

Professionals who responded to the survey included 49 women and 88 men. Age variation was of 50 years, between the ages of 25 and 71. 68% of the respondents are between 30 and 50 years old. Almost half of them (49%) have lived between 1 and 5 years in the current country of

residence (see figure 2).

Figure 2. Years of Residence in the Country of Destination



Fifty-nine of the respondents (19 women and 40 men) take part in an association. Fifty-one are members of a Mexican association and 8 mention associations that also involve other nationalities. The associations with most members were: the RTM in Germany, Canada and the US; Ex-a-Tec (Former Students of Institute of Technological Studies, Monterrey); Anahuacalli (France) and the Mexico – China Chamber of Commerce.

2.3 Voices of Mexican professionals

This survey got answers from Mexican professionals living in the following geographic areas: Europe (57); North America (55); Middle East (9); Asia (8); Latin America (4); Africa (2) and Oceania (2). The countries with most responses were: the US (38), France (23), Canada (17) and Germany (14). 120 of the respondents (87%) maintain their Mexican nationality. Only 17 of them (12%) declare dual nationality, which suggests a rather low level of integration to the respective countries of destination. As a matter of fact, other researchers (Jaffrelot & Lequesne 2009, p. 202) confirm that Mexicans and Canadians in the US show lower nationalization level compared to other Latin American migrants.

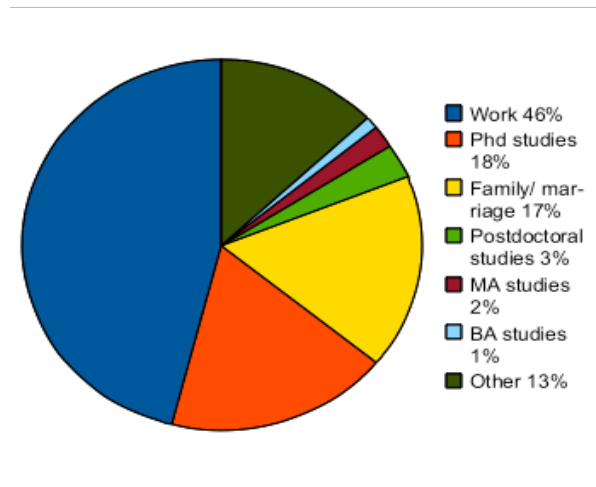
If we define foreigners in terms of the retention of nationality in the country where they reside (see Kristeva 1988), we may conclude that most of the Mexican professionals belong more to Mexico than to their new country of residence. This is also due to the few years that most of them have spent in the country of destination.

The level of cosmopolitanism of this group was analyzed based on the number of countries where each individual has previously lived, besides the current one and Mexico. A cosmopolitan person is someone “with no stable residence, a person who is not a stranger in any place” (Kristeva, *ibid.*, p. 207). Almost half of the respondents (64) emigrated to the current destination without having passed through another country of residence. 40 of them have lived in one more country; 18 of them, in 2 more countries; 10 of them, in 3 other countries; 2 of them, in 4 other countries and 3 of them, in 5 other countries. This suggests a rather low cosmopolitanism of Mexican professionals.

Some Reasons for Migration

The main reasons for migration, according to the sampled group are: work; studies and marriage/ family reunion in a different country, as well as violence in Mexico in the last years. These three are sometimes combined, as shown.

Figure 3. Main Reasons for Migration



Migration for Studies

Graduate studies are an important channel of migration. Some of the respondents (12) chose to continue in the same country for MA and PhD studies⁷ (table 4). Out of these, 6 also stayed there to work after their PhD (table 5). Only 3 individuals of the sampled group took their MA and doctoral studies in Mexico but migrated to Germany, Switzerland and the US. This shows that many of the Mexican talents abroad are not “drained brains” but immigrants who later became highly qualified.

Permanence in the same country for postdoctoral studies after PhD seems to be less frequent, as only 2 of the respondents chose this option (table 6). Only one individual of 137 took his MA, PhD and postdoctoral studies in the same country (US), and he now lives in Israel.

Table 4. Permanence Abroad after Graduate Studies (MA, PhD and Postdoctoral)

	MA	PhD	Postdoc	Current country of residence	No. of incidents
1	Germany	Germany	X	Germany	3
2	Denmark	Denmark	X	Denmark	1
3	Spain	Spain	X	Spain	1
4	US	US	US	Israel	0
5	US	US	X	Saudi Arabia	1
6	US	US	X	US	6
7	France	France	X	France	10
8	Mexico	Mexico	X	Germany	1
9	Mexico	Mexico	X	Switzerland	1
10	Mexico	Mexico	X	US	2
11	UK	UK	X	UK	1
12	X	US	US	US	1

Table 5. Main Countries of Destination for Doctoral Studies vs. the Option of Staying Abroad

Country	PhD students	Percentage of the total doctoral studies (approximate)	Number of individuals who stayed in the same country	Percentage of permanence per country
France	16	27%	14	87.5%
US	15	25%	10	66.6%
Germany	4	7%	4	100%
Canada	4	7%	4	100%
UK	4	7%	1	25%
Denmark	3	5%	3	100%

Table 6. Main Countries of Destination for Postdoctoral Studies vs. the Option of Staying Abroad

Country	Postdoctoral fellows	Percentage of the total number of postdoc students (approximate)	Number who stayed to live in the same country	Percentage of permanence per country
US	10	45%	6	60%
France	3	13.6%	3	100%
Canada	2	9%	0	0%
Denmark	2	9%	1	50%

Migration for Marriage/ Family Reunion

Marriage is another important channel of migration. 27 individuals of the sampled group got married and stayed in the country where they took their graduate studies, while another 37 chose to live in the country of their wife/spouse. The countries where this happens most are the US, France, and Germany.

The gender proportion for individuals who choose their country of residence according to marriage is of 10 women for 8 men.

Reasons to Stay Abroad

Some of the main reasons to stay abroad seem to be labor satisfaction in the country of destination vs. the critiques to the current situation in Mexico. The majority of the sampled group (102, that is 74%) declare themselves satisfied or very satisfied with their work abroad. Distribution of discontentment by gender is of 15 women for 20 men, a proportion that follows the gender division for the overall survey.

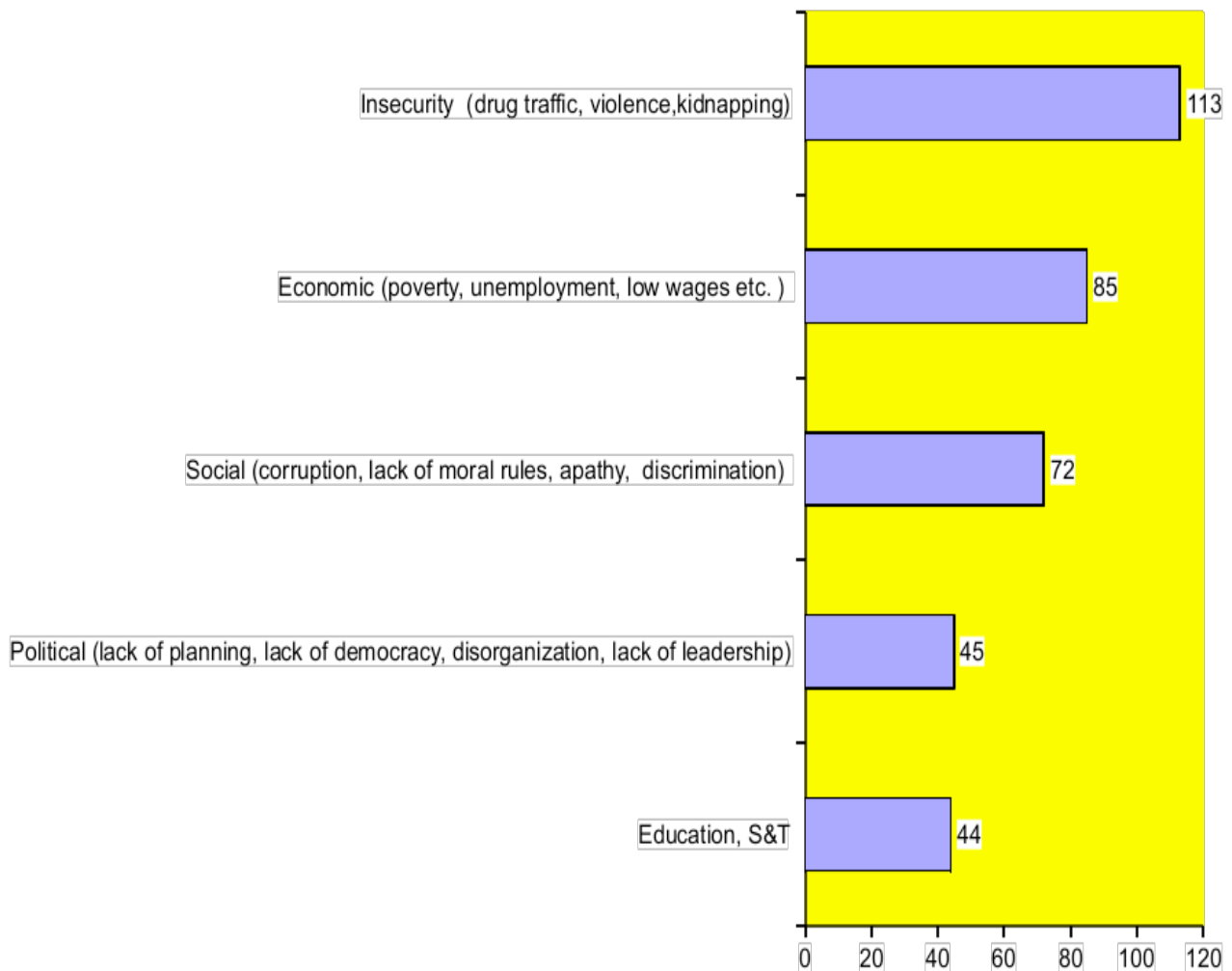
Of a total of 9 individuals who declare to have suffered labor discrimination, 5 are women and

4 are men. The countries where we most encounter labor dissatisfaction incidents are: Canada and the US (7 cases each); France (6); Germany (3); Denmark and Italy (2 each); Spain, China, and Switzerland (1 each).

Almost half of the respondents (46) identify a slowdown in the Mexican economy after they left the country. Another 33 believe there has been little progress; 32 think that advancement has been regular and only 8 see a lot of progress in the country's economy.

These answers have to be related to the number of years that the person has lived abroad. Those who left Mexico many years ago tend to state that there has been some progress (a lot or regular), while those have been abroad for less than 5 years appreciate a slowdown or little progress in the country's economy.

Figure 4. Main Problems in Mexico According to the Sampled Group



Happiness Levels

The migration of professionals is conceived as a loss not only because of what the country has invested in this individuals, but because of what they could give back if they worked in the countries of origin. This differs in the case of low skilled, where remittances matter more than the loss of a certain group of population previously unemployed or occupied in the country, for instance, in agriculture. From this elite perspective, professionals as a group "have more value than others and their loss is charged with more resentment" (Dumitru 2009, p.39).

The migration of professionals awakes the guilt of the government, who did not know how to be sufficiently attractive in order to keep them but also of the migrant because he/she left the country, sometime with debts (as in the case of the scholarship beneficiaries of the National Council of Science and Technology).

When professional migrants are considered as part of the "brain drain", this is a concept that tends to stigmatize the person, even though it instead names a macroeconomic problem – the loss of human capital. As a matter of fact, 71 of the respondents to the survey rejected such a term; 40 of them believe that the concept does not apply in their case and 13 like it because of its connotation for the politicians; it is a way to draw the attention and put pressure for a better work and life environment in Mexico. 15 of them declare that migration is an option of personal development and other 15 reject having run away from anything. 10 declare that the concept does not apply as they are still in touch with Mexico. Others state that: it is the government's fault; they do not consider themselves as such (3); they would like to return (5).

Life quality

The majority of the respondents (127) consider that they live well and only 10 declare the opposite. 6 of the unsatisfied are women and what they lack for a better life is:

"A more stable job" (Canada);

"Space at home" (France);

"A job related to Mexico" (France);

"A good place to live" (Germany);

"I live for work. Even though I have a job, my life quality is not good" (US).

Men worry about two different issues:

"I wish that CONACYT respects its agreement and pardons my debt for my MA studies" (France);

"What I miss here are women, as 70% of the population here are men" (Man, Qatar).

Life Conditions

The answers to the open question about their life condition as migrants can be classified in 7 categories: a) the optimists; b) the satisfied; c) the thankful; d) the melancholic; e) the resented; f) the self-defenders; and g) the militant. This categorization must be seen as a way to organize the answers, but does not aim at statistical or psychological values.

a) The Optimists. These are but a few to consider that the situation in Mexico has improved since they are gone. They do not believe that they are abroad because they ran away from Mexico, but because of life circumstances.

We live well abroad, but we also get to value Mexico and get a broader perspective.

Mexico still got hope. (BA in Law, 5 years in Germany)

The education of Mexican scientists is a good one. (Physical scientist, 2 years in Switzerland)

b) The Satisfied. These ones declare themselves satisfied with their current life quality, without comparison to what could have happened if they stayed in Mexico.

I am very happy to be where I am, my personal and professional development have been excellent. Germany has treated me marvelous. (Biomedical researcher, 10 years in Germany)

I am doing great! (Mechanical and electrical engineer, 26 years in Canada)

c) The Thankful. They express their thanks to the professional formation they got in Mexico:

I would like to thank Mexico for the opportunity of studying and preparing myself professionally. (Architect, 40 years in en Israel)

I am proud to be a Mexican. (BA in Communication, 13 years in the US)

d) The Melancholic. They mention aspects that they miss from their life in Mexico.

I am feeling very well and everything is going on all right. I would like to return to Mexico to build a high tech company and teach people that dreams can come true. (Electrical engineer, 12 years in Germany)

I am fine, happy, but I do miss the friendliness of the people and especially, my family. (Engineer, 18 years in the US)

I would like to have the same work conditions in my own country (Translator and technical editor, 13 years in Canada)

e) The Resentful. They criticize the current situation in Mexico, be it political, economic, education, S&T or security. This is the most represented group.

Education that ignores civic and moral values serves for nothing. (IT Engineer, 7 years in Germany)

We need more support for the Mexican talent and more effective educational programs in the entire country. (Industrial and IT engineer, 2 years in China)

I sadly see the loss of leadership we once had in Latin America and that Brazil has won. (Economist and Business Manager, 2 years in Cote d'Ivoire)

It is necessary to improve the image of the country. (BA in Communication, 8 years in El Salvador)

I would have liked staying in Mexico, but I applied for a job at 10 academic institutions in 6 years and as I was not part of the team, I could not get any of the positions. I really regret that the way they hire in Mexico forced me to live abroad. (Economic historian, 5 years in the US)

It is necessary to respect science, value the work of scientists, create conditions so that they may grow, increase the GDP for science. It is necessary to educate Mexicans. Without science, Mexico is condemned to eternal dependency. (IT engineer, 7 years in France)

As a scientist, I suggest more investment in education, research and international exchanges for students and teachers. (Biologist, 33 years in Israel)

f) The Self Defenders. They implicitly defend their decision to migrate in search for a better life and advise other people to do the same.

Do not fear of getting away from Mexico. The world is big and with huge possibilities for those who are prepared and are ready to adapt themselves. (Pilot, 15 years in Saudi Arabia)

I think that instead of progressing, the country is walking back. Everything is worse than when I left. I personally recommend to look for opportunities abroad, if people have the chance to. (Finance expert, 4 years in Canada)

We have high values as Mexicans. But no one is a prophet in his own country, so we have to go abroad so that we may one day return to our own country what it gave us. (Industrial engineer, 3 years in China)

g) The Militant. They would like to do something to help Mexico, so they may be the target group for the diaspora policies.

Please effectively design and communicate policies of integration and collaboration (not return) for those Mexicans who would like to establish knowledge networks to benefit Mexico." (Teacher and researcher, 12 years in the US)

With all the Mexicans who live abroad and who had the opportunity to integrate to productive, scientific, political and social processes of developed countries, we could build an "army" of highly qualified individuals, who could bring back good results, if they returned to Mexico. For this we need money, nobody will return if they do not have a relatively stable job. (Researcher, 6 years in Italy)

Return Possibilities

Asking people if they would return to Mexico could lead to a simple answer (yes or no), when return decisions are more complicated and depend on various other factors than a person's will, such as family or professional circumstances. So we preferred to ask a more subtle question in the survey:

“Where would you like to live?” Besides the fact that some could mention Mexico, we can also see which other living places they prefer, besides their country of origin. 48 would stay in the same country where they are now; 38 would return to Mexico under certain circumstances:

1. *Not in Mexico City* (Researcher, 7 years in the US)
 2. *In Mexico, without violence* (Microbiologist, 28 years in the US)
 3. *In a peaceful and safe Mexico, not in the present one* (Director, 9 years in the UK)
 4. *Mexico if national insecurity were not SO SHAMEFUL* (Commercial manager, 6 years in France)
 5. *Mexico without corruption or crime* (Expert in Telecommunications, 18 years in the US)
- 35 would choose a different place from the current country of residence, but that would not be Mexico. 6 do not care or do not answer.

Remittances

Remittances are yet another factor usually related to migration and return possibilities. Only 42 of the 137 sampled group (30%) send remittances to Mexico. Out of these, 9 are women and 33, men. The hypothesis to be verified by further studies suggests that highly qualified individuals send less remittances to the country or origin than do less qualified individuals, also because they usually come from a higher social class, which does not need the remittances.

Lessons From the Mexican Case

The Mexican diaspora has favored countries of destination but its organization has not transcended to business and elite networks that could function as co-development agents for Mexico. Diaspora public policies need to facilitate the organization of communities in order to stimulate its cohesion and integration, rather than necessarily return, so that these may be real factors of decision (elites or business diasporas), and help their country of origin.

Diaspora policies start from the fact that the government may not be able to solve problems such as job creation or violence on a short term. Therefore diaspora policies need to deal with the current situation, starting from a realistic base of work. This means permanent and direct communication the diasporas in order to obtain direct information on their needs and actions. Listening to the lost talents for science and technology in Mexico may help to build public policies according to the reality inside and outside the country, according to the needs and critiques that professionals have shown in the survey. The figures on drained brains refer to real persons, that could be participative subjects of governmental policies, not only passive objects of planning.

The Mexican government needs to promote cooperation between the Network of Mexican Talents Abroad and other associations of Mexicans. The Institute for Mexicans Abroad may not be the only one in charge of the success of the network; other institutions such as CONACYT have to cooperate with regional chapters in order to guarantee its success, in terms of creation and functioning of real investment and innovation projects to stimulate the Mexican economy

Women will have to be involved more, as they are more affected by brain drain through underemployment. The policy for professionals needs to be personalized: a “brain” is a personal with huge possibilities of choosing his or her own place of work.

In order to stimulate foreign direct investment, there is need for activities to promote the image of Mexico to the diaspora and from the diaspora to the public opinion of other countries, improving the current perception of danger in violence in Mexico.

Another important aspect are scholarships abroad, that could be handled through a system similar to the Brazilian one: the sandwich” scholarships (in between studies rather than graduate studies only). Attention needs to be put to the relation between the number of graduated students and the number of jobs available. The ones who stay abroad after receiving a scholarship funded by the Mexican government may be considered as a loss even though it is for the personal and professional benefit of the person.

Another problem is the lack of articulation between policies of education and migration policies. For instance, there is no agreement between the National Migration Institute and the Ministry of Foreign Affairs, so that foreigners who benefited from scholarships in Mexico could stay, in a possible intent of a brain attraction policy. This could benefit Mexico along with repatriation, as the

country would have its own strong diaspora but also sufficient highly qualified individuals on its territory.

CONCLUSIONS

Public policies for the diaspora are a necessity for both countries of origin and countries of destination. In fact, the difference between destination and origin of migration is becoming to fade away in globalization, with more circulation of professional from everywhere. These policies need to be designed in three levels, according to a model of decision making that takes into account the characteristics of the diaspora, the methods available and the type of desirable and suitable policies.

1) The **characteristics of the diaspora** evaluate elements such as: size; destines; years of residence abroad; reasons for migration and permanence abroad; the global market of competences. Policies have to be oriented depending on the years of residence abroad, as an individual who has migrated more than a decade ago does not have the same relation with his country of origin as a graduate student or a recent migrated person. It seems easier to return the more recent ones first.

2) **The means and methods available:** institutional cooperation – national and international level; cooperation among various type of diaspora associations.

3) Finally, the **outcomes** may be **policies of:** return; attraction; networking; dialogue (know the diaspora and being known by it) and image promotion, to mention but a few.

The global market for competences also needs to be accepted. If a country cannot compete against more developed countries, it should have a more permissive policy for immigrants from other less developed countries. Governments have to appreciate the reality of competition for human resources and opt for networking or return, according to the case.

NOTES

¹ Diaspora is here understood as the community of professional abroad from a specific country, with different levels of organization.

² Colombia is one of the most quoted examples for network of scientists abroad. It was the first country to initiate a program of repatriation in the 60s and it is still an example of political planning of migration. Colombia launched its Program for the Return of Professionals in 1972. Ever since, the national legislation offered some incentives for the elimination of custom taxes and fiscal benefits, for the return of persons with graduate and undergraduate studies, as well as scientific and practical knowledge.

³ The case of Cesar Milstein, Nobel Prize of Medicine in 1984, is often quoted as case of political prosecution that caused his decision to live abroad.

⁴ Preferential differences (“diferencial de preferencias”) were proposed by Oteiza (1971 in Pellegrino 2001) to name the way in which personal options of migrants determine high – skilled migratory flows. The main factors to be considered are: income, logistical support for professional purposes, professional recognition (prestige), and factors including political conditions, institutional conditions, level of freedom or ideological discrimination.

⁵ The institutions in charge of diaspora programs – mainly the Institute of Mexicans Abroad and the National Council for Science and Technology do not realize direct statistical research on the overall population of professionals. The National Council for Population provides data based on population referenda in Mexico, therefore it does not take into account changes in the professional and educational status of Mexicans after they left the country.

⁶ The survey was available online between July and November 2010.

⁷ The chosen countries were Germany, France, Denmark, UK and US.

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EL CUERPO Y SU CONCEPTUALIZACIÓN POSMODERNA EN *PÁJAROS DE LA PLAYA*

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En el siglo veinte la epidemia de SIDA llega a ser "el mal del siglo", una verdadera pandemia cuyas propiedades eran muy poco comprendidas. Sin embargo, a pesar de la propagación de la enfermedad y de la alta tasa de mortandad causada por ella, el SIDA no llegó a ser una temática importante de las obras de ficción latinoamericanas. Ignacio Trejo Fuentes, en su artículo titulado "Novela sobre el SIDA (y otras cosas)" explica que a pesar de los "terribles efectos psicosociales, la literatura mexicana, (y diríamos latinoamericana en general), se ha ocupado muy poco, casi nada, del asunto: la bibliografía al respecto tiene que ver con estudios de carácter médico, estadístico, pero en la llamada literatura de ficción (o de creación) brilla por su ausencia..." (1). *Pájaros de la playa* (1993) del escritor cubano Severo Sarduy es una de las escasas obras latinoamericanas que tratan el tema del SIDA unos años después de su aparición y propagación. Esta obra difiere de la narrativa previa del escritor conocido por su estilo neobarroco, lúdrico y experimental. En ésta, su última obra, Sarduy narra los efectos del SIDA y articula la experiencia del dolor físico y del duelo ante una muerte inminente, experiencias poco expresadas en la literatura.¹ El aislamiento, la estigmatización, el miedo, la pérdida de control, el dolor tanto físico como psicológico, el duelo, la juventud perdida y la desesperación son algunas de las facetas que explora la obra de Sarduy publicada póstumamente. Este escritor cubano enfrenta la incomodidad sentida durante siglos al tratar el tema de la enfermedad, y lo hace sin la intencionalidad moralizante o romántica de sus predecesores. Toca aquello de lo que nadie quiere hablar, aquello en lo que nadie quiere pensar: la enfermedad y la muerte, dos temas que pertenecen al reino del tabú. La meta de este trabajo es examinar la problematización del cuerpo posmoderno a través de la protagonización del cuerpo enfermo (y moribundo) en *Pájaros de la playa* de Severo Sarduy. Tanto el texto como el cuerpo son entidades contaminadas: el texto lo es por las transgresiones de las normas tradicionales, y el cuerpo por la epidemia de SIDA. Por razones de tiempo sólo nos concentraremos en algunas de las manifestaciones corpóreas de la enfermedad en la novela.

Esta novela cuya acción transcurre en un sanatorio en una isla sin nombre destroza el carácter secreto de la enfermedad grave y rompe el silencio literario sobre el tema. A través de personajes sidáticos jóvenes, una vieja que quiere rejuvenecer, dos médicos (un herborista y un practicante de la medicina moderna) y el personaje del Cosmólogo quien graba los efectos de la enfermedad misteriosa que los aqueja, Sarduy cuestiona la conceptualización tradicional del cuerpo contaminado y lo aparta de su definición tradicional como manifestación del pecado y de la inmoralidad. En este sentido, *Pájaros de la playa* se suma a las otras obras de Sarduy con su postura crítica contra el orden establecido, aunque se aparta en su temática y su estilo.

Basta recorrer los poemas, los ensayos y las novelas de Sarduy para descubrir que el cuerpo fue sin duda una de sus grandes pasiones. El cuerpo marginado, en particular, es central en su obra y lo sigue siendo en *Pájaros de la playa*. Sin embargo, en lugar de ser cuerpo exagerado, travestido, enmascarado o perverso, en *Pájaros de la playa*, es cuerpo enfermo de SIDA, el mal estigmatizado del siglo veinte. El SIDA marca tanto texto como cuerpo aunque el nombre de la enfermedad nunca se menciona. "El mal", tal y como lo designa el narrador en la novela, es percibido a través de sus síntomas. Susan Sontag explica que los seres humanos tienden a asociar cierta magia o misterio con el nombre de ciertas enfermedades y por esta razón evitan pronunciar el nombre de la enfermedad.² Entonces al evadir señalarla, Sarduy desafía el poder que tiene la palabra SIDA sobre su vida, su escritura y su cuerpo. Así que, al no referirse al SIDA por su nombre, Sarduy permite que la experiencia de la enfermedad y de luto pueda expresarse fuera de las presuposiciones y los prejuicios a la vez que intente restringir el poder de esta plaga.

El síndrome de inmunodeficiencia adquirida apareció a principios de los años ochenta y parecía contagiar principalmente a homosexuales, bisexuales y toxicómanos (Daudel y Montaigner 9). La conceptualización general y temprana de esta enfermedad era de una plaga que castigaba principalmente a homosexuales y otras 'gentes de mal vivir'. Como se sabía muy poco sobre la enfermedad, muchos pensaban que se manifestaba como castigo divino o como eliminación necesaria de ciertos grupos considerados indeseables y marginales. A propósito de las creencias asociadas con

ciertas enfermedades, Henry E. Sigerist explica en su libro *Civilization and Disease* que ciertas actitudes medievales hacia las enfermedades perduran desde la época medieval como lo es pensar que ciertos males son merecidos por los que los padecen. Entonces, declararse sidático era revelarse como participante en ciertos comportamientos de alto riesgo y por ende someterse a las actitudes moralizantes de la sociedad. Según Susan Sontag:

It is not a mysterious affliction that seems to strike at random. Indeed, to get AIDS is precisely to be revealed, in the majority of cases so far, as a member of a certain "risk group," a community of pariahs. The illness flushes out an identity that might have remained hidden from neighbors, jobmates, family, friends (*Aids* 24-25).

El SIDA marca tanto la identidad como el cuerpo e identifica al sidático como paria. Sella al enfermo como ser peligroso por su condición de contagioso y justifica su aislamiento. Las palabras de Alberto Sandoval Sánchez, escritor, y crítico puertorriqueño contagiado de SIDA describen la segregación de los subalternos y de los enfermos de SIDA en particular:

...las personas que viven con SIDA...amenazando contaminar el orden simbólico, deshaciendo tabúes culturales alrededor del cuerpo, y poniendo en juego todos los sistemas de orden y lógica cultural, deben ser mantenidos a distancia y relegados a los márgenes, de la misma manera en que los fluidos corporales, las secreciones, y los desperdicios son expelidos. Expulsado del cuerpo político de la nación, ese "otro" impuro y fuera de lugar es reinscripto como un extraño, un monstruo, un exceso o una carencia que provoca ansiedad, horror, disgusto (348).

La escenificación de la novela de Sarduy en una isla no es casual ya que la isla es metáfora de Cuba y de la segregación y del aislamiento. Para Guillermina de Ferrari, también existe una conexión muy clara entre la marginación de los enfermos en un sanatorio en *Pájaros de la playa* y la cuarentena obligatoria que impone el gobierno castrista a los contagiados de SIDA en el sanatorio conocido por "Los Cocos" (228). Sarduy describe la segregación como una muerte doble: la social precede la muerte física agudizando el sufrimiento. Que el aislamiento social sea impuesto por las autoridades o que sea autoimpuesto por el enfermo mismo (por vergüenza o por miedo) la enfermedad significa pérdida para el infectado del virus.³

El enfermo no sólo pierde derechos y privilegios al saberse y declararse contagiado de SIDA sino que también pierde su percepción de sí como sujeto con identidad relativamente estable. Es identificado tanto por los que saben de su enfermedad como por sus médicos como sídico y su enfermedad eclipsa los otros aspectos de su identidad. La mirada médica en particular es muy a menudo deshumanizante y reduce el tratamiento del SIDA a una práctica técnica que no toma en cuenta aspectos emocionales o psicológicos del enfermo (Spoiden, Marulanda). La relación médico-paciente es muy impersonal ya que los médicos (o vampiros como los llaman los enfermos del sanatorio) sólo se ocupan y preocupan por la presencia o ausencia de los síntomas del virus. Sarduy critica la falta de apoyo psicológico y emocional y rechaza la valoración médica del cuerpo que aísla mente y alma de lo carnal, reduciendo el cuerpo a sus síntomas, a sus males. El hospital y la mirada médica son espacio de la reducción de la libertad personal, libertad de espacio y de elección individual. El sanatorio/hospital se convierte en lugar de aislamiento y vigilancia donde Sarduy pierde su vínculo con la sociedad mientras espera perder su vínculo con la vida. En el proceso pierde también su identidad al ser reducido a un conjunto de órganos y células desconectados de su persona.

La deshumanización que sufre el sídico por la práctica médica también la sufre por los efectos físicos del SIDA. Esta enfermedad deforma el cuerpo revelándose en la superficie del organismo. Sus síntomas evidencian la presencia del mal, lo que Arthur y Marilouise Kroker llaman "the crisis within", delatando el proceso de descomposición que efectúa el virus implacable. La transformación del cuerpo es documentada en la novela a través de los diferentes personajes quienes relatan la degradación del cuerpo que efectúa el mal. Una de las primeras consecuencias del Sida descrita en la novela desde sus primeras páginas es el envejecimiento. Los habitantes del sanatorio, "jóvenes prematuramente marchitados por la falta de fuerza, golpeados de repente por el mal" (*Pájaros de la playa* 20) adquieren la apariencia de unos viejos, pálidos, calvos y arrugados. Sin embargo, otros síntomas del mal degeneran aún más a los enfermos porque les marcan la cara y la piel⁴. La manifestación de "El

herpes en el párpado" además de "erupciones, granos, forúnculos, sarcomas y sarnas" impresiona y espanta. El Cosmólogo declara: "Si nos miramos involuntariamente en un espejo...lo que vemos nos hiela: un esperpento apresurado, de pómulos hundidos y cabeza calva, nariz filosa y negruzcos labios. Rodea la figura un manchón pintarrajeado, frotado con carbón" (*Pájaros de la playa* 155). Henry Sigerist, en su estudio sobre la enfermedad, constata que los seres humanos tienden a rechazar más a los enfermos cuyo padecimiento desfigura: "A relatively harmless skin affection can render an individual unemployable and mere pimples can poison a girl's social life. A skin disease reveals to everybody that a system is sick" (70). Así que las marcas del SIDA en la piel agudizan la estigmatización y la marginalización y, por ende, el sufrimiento del enfermo. El cuerpo abyecto llega a ser aún más peligroso por la posibilidad de contagio que siempre lleva expuesta abiertamente. Además, las actividades más banales, aparte de requerir mucho esfuerzo, ahora se convierten en procesos que pueden contaminar: "cortarse las uñas, y aún más afeitarse, se convierten aquí en una verdadera hazaña de exactitud, a tal punto es grande el miedo a herirse, a derramar el veneno de la sangre sobre un objeto, sobre un trapo cualquiera que pueda entrar en contacto con otra piel" (*Pájaros de la playa* 111). La enfermedad contagiosa no sólo reduce el espacio social y físico del enfermo sino que también limita sus actividades y movimientos.

El horror de la enfermedad convierte el cuerpo en "enemigo despiadado" que exige "toda posible atención". Cuidar las infecciones, los temblores, los desmayos y las diarreas se convierte en obsesión total. La enumeración de todas las medicinas que tiene que tomar el Cosmólogo refleja, por ejemplo, su fatiga por la rutina médica:

He aquí, el "menú" de cada día: en los pies, Fongamil, entre los dedos, y Diprosone, en la planta; en la rodilla penicilina; en el testículo, Borysterol.

Los tazones diferentes...aportan Visken, Nepresol, Depakine Malocide, Adiazine, Lederfoline, Retrovir (AZT) o en su lugar Videx (DDI), Inmovane. El último es sólo un somnífero. Además Cortancyl –en ayunas-, Zovirax, Diffuk y, si es preciso, Atarax.

El Teldane –antialérgico-, el Doliprane –analgésico- y el Motilium –antivomitivo- son opcionales (*Pájaros de la playa* 157).

La multitud de medicinas prescritas no elimina por completo los síntomas nocivos de la enfermedad ni la sombra constante de la muerte.

A pesar de todas las tentativas de posponer la muerte, el avance continuo "del curso letal" y la presencia constante del dolor no permiten distraerse de su cercanía hasta el extremo que entre el paciente y la enfermedad se desarrolla una estrecha interdependencia: "Antes disfrutaba de una ilusión persistente: ser uno. Ahora somos dos, inseparables, idénticos: la enfermedad y yo. Parece que el embarazo procura esa misma sensación" (*Pájaros de la playa* 160). El narrador/Cosmólogo expresa en diferentes ocasiones en la novela el deseo de extirpar el mal de sus entrañas, como si fuera otro ser: "arrancarse del cuerpo el mal...como un segundo cuerpo impalpable y carbónico que se confunde con el nuestro, que lo desborda levemente" (164). La metáfora del embarazo es una que Susan Sontag emplea en su discurso sobre el cáncer⁵ y que Guillermina de Ferrari destaca en su estudio sobre *Pájaros de la playa*.⁶ Alberto Sandoval Sánchez también maneja la imagen de preñez al hablar de los síntomas de su SIDA:

Les cuento que tengo náuseas, que siento mareos, y debilidad.
Dicen "debes estar embarazado".
(346-47).

El SIDA se convierte en especie de monstruo incubado en el cuerpo, contaminando y matando sigilosamente. El proceso de morir se vuelve algo insostenible y difícil, proceso que requiere energía, energía que el enfermo no tiene.

Dentro de este cuerpo adolorido, fatigado, extenuándose, no hay mucho espacio para el placer. Algunos momentos de goce se esparcen por el texto pero, de la fiesta carnal de obras anteriores, no queda mucho en *Pájaros de la playa*. Según Rafael José Díaz en su artículo "La fiesta y el dolor: sobre el último Severo Sarduy", "sólo raras epifanías, opacos milagros, hacen vibrar por un instante los cuerpos de los enfermos" (92). Para estos cuerpos enfermos, aislados, cansados y obsesionados por la rutina médica diaria, el goce físico, particularmente sexual, viene principalmente a

través de los recuerdos. El Cosmólogo está tan consumido por su enfermedad que el recuerdo de un cuerpo saludable y atractivo lo sorprende: "Un cuerpo esbelto que nada en una piscina de mosaico azul, profunda y transparente. El bañador es negro, las nalgas duras; se zambulle: el agua fresca me salpica" (*Pájaros de la playa* 136). Este recuerdo invoca el placer pero, como el Cosmólogo declara que las memorias son embuste, quedan los pocos momentos de deleite cancelados. Además, las rememoraciones del pasado son deleite pasajero, que no dura porque: "los recuerdos...van devorando al que los rememora, como una lepra lenta que lo aniquila y corrompe de la cabeza a los pies hasta convertirlo en una ruina orgánica, de la podredumbre piadosa designación" (132). El cuerpo de antes, poseído por el deseo, obsesionado por el goce, en *Pájaros de la playa* es consumido "como un viejo instrumento cuyo disfrute agotamos y cuya armonía no marca más que una infancia de reglas impuestas, de esfuerzo y represión" (132). Debilitado y desgastado por la enfermedad, en el cuerpo sarduyano no hay espacio para el goce.

En *Pájaros de la playa*, novela sobre la inevitabilidad del envejecimiento y la muerte, Sarduy forja un camino nuevo para la expresión de un tema tabú y estigmatizado, el de la enfermedad grave. Sarduy rompe el silencio con su propio cuerpo textual contagiado. A través de sus personajes, muchos de los cuales contaminados por el "mal", representa las multifacéticas manifestaciones del SIDA. A pesar de su toque más tradicional, *Pájaros de la playa* es una continuación de la trayectoria de transgresión del autor. Es su último acto de subversión. Apela a una reinterpretación de la enfermedad al humanizarla y al darle vigencia en su texto. Susan Sontag declara que el cáncer [y como demostramos, el SIDA también] es tema demasiado escandaloso y, por eso, es inimaginable estetizarlo (*Illness* 20). Sin embargo, Sarduy desafía esta noción al articular la experiencia del dolor, del sufrimiento y del luto frente a la muerte cercana e inevitable y al ofrecer una descripción íntima del desvanecimiento. La enfermedad está tatuada tanto en el cuerpo como en el texto y el lenguaje del cuerpo y el cuerpo del lenguaje expresan la contaminación. El cuerpo, esta superficie cuyos placeres buscó en todas sus manifestaciones, cuyas restricciones buscó eliminar, le ha fallado. Nada le ofrece consuelo, ni la medicina, ni la compañía de otros sidáticos, ni los recuerdos, y, por supuesto, ni el Dios que Sarduy rechazó desde sus primeros escritos y a quien caracterizó como un "demiurgo menor, simpaticón y de buena voluntad, pero más bien torpe. Casi todo le salió al revés, o inútilmente complicado, o aproximativo, o chato..." (*Pájaros de la playa* 25). El cuerpo que antes estaba en busca constante del placer ahora busca bregar con la muerte inminente y definirse ante ella "adiestr[ándose] a no ser" (133).

Notas

¹ En su ensayo "On Being Ill" Virginia Woolf lamenta la falta de protagonismo de la enfermedad en la literatura y cuestiona el hecho que no haya ocupado un espacio con otros temas importantes y bien desarrollados como el amor y la envidia: "...it becomes strange indeed that illness has not taken its place with love and battle and jealousy among the prime themes of literature" (Woolf 9).

² "The very names of such diseases are felt to have a magic power. In Stendhal's *Armance* (1827), the hero's mother refuses to say "tuberculosis," for fear that pronouncing the word will hasten the course of her son's malady" (Sontag, *Illness as Metaphor* 6). También, Stéphane Spoiden escribe sobre la inabordable del sífilis particularmente en la literatura. La tuberculosis, enfermedad menos deshonrosa, sí llegó a ser retratada en las obras literarias aunque, por mucho tiempo, como reflejo de un carácter defectuoso (Spoiden 15).

³ A propósito de la pérdida, el Cosmólogo comenta cómo la enfermedad le roba, poco a poco, su libertad de movimiento y de pensamiento: "Cuando la carencia de energía asalta, o bien cuando, progresiva y solapada va tomando posesión del cuerpo, cada día se pierde la capacidad de hacer algo, cesa o se degrada un don, se corrompe un recuerdo, un nombre propio se tergiversa" (*Pájaros de la playa* 134).

⁴ Susan Sontag declara que las enfermedades que más terror causan no son únicamente las letales sino también las deshumanizantes. Al comparar el SIDA con el polio y otras enfermedades que

desfiguran dice: "further, polio affected the body only, though that may seem ruin enough, not the face" (*AIDS* 39) y "the marks on the face of a leper, a syphilitic, someone with AIDS are the signs of a progressive mutation, decomposition; something organic" (*AIDS* 41).

⁵ Véase *Illness as Metaphor*. New York: Farrar, Straus and Giroux, 1977

⁶ Véase "Enfermedad, cuerpo y utopía en *Los pasos perdidos* de Alejo Carpentier y en *Pájaros de la playa* de Severo Sarduy". *Hispanic Review* 70.2 (Primavera 2002): 219-41.

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FROM THE CULT OF BOLÍVAR TO THE CELL OF GRAMSCI: HUGO CHÁVEZ'S INTELLECTUAL REENACTMENTS

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It is not important that this movement had its origins in mediocre philosophical works, or at best, in works that were not philosophical masterpieces. What matters is that a new way of conceiving the world and man is born and that this conception is no longer reserved to the great intellectuals, to professional philosophers, but tends rather to become a popular, mass phenomenon.

—Gramsci, *The Prison Notebooks* (417)

En la cárcel muchas veces recordé aquellas lecturas de décadas atrás y nunca me sentí preso en verdad, ni desesperado o encerrado, no, me sentía libre en aquel pequeño espacio, sobre todo porque estaba aprovechando mucho el tiempo. En el orden ideológico pude consolidar más, todo aquello que durante años veníamos estudiando, esencialmente, la ideología bolivariana.

—Hugo Chávez, *Chávez: Un hombre que anda por ahí* (11)

Introduction

Recognized as a scholar of Simón Bolívar after graduating from the Military Academy in 1975 (Jones 79), Hugo Chávez first strategically utilized the Liberator's name as a means of political symbolism in 1982 when he inaugurated a covert cell of soldiers intent upon fighting military corruption under the name of the "Ejército Bolivariano Revolucionario-200" (EBR-200).¹ The ritual inauguration consisted of a virtual reenactment of Bolívar's famous oath on Monte Sacro in which he pledged to liberate Venezuela from Spanish tyranny. Chávez maintained the structure of this foundational story of Bolívar's legacy, simply altering several words to replace references to Spanish colonialism with claims to free elections and an attack upon the ruling oligarchy (the latter was in fact the rallying cry of Ezequiel Zamora, the nineteenth century revolutionary leader during the Venezuelan Federal War). This ideological marriage of political and historical symbolism, a means of understanding the present and the past as mutually constitutive, has remained consistent throughout the evolution of Chávez's presidential discourse, from the rechristening of Venezuela as a Bolivarian Republic to the exhumation of the Liberator's remains in order to determine whether the cause of death was disease or in fact murder. In a study of literature's historical relationship with the cult of Bolívar, however, Conway points out that Chávez is not the first Venezuelan president to successfully harness the image of Bolívar for national purposes (156); his particular nuance is a form of "Bolivarian self-fashioning" in which he engages in thinly-veiled reenactments of the Liberator's written historical traces (152).

Chávez has been criticized for his militarization of the government. Nonetheless, if Bolívar was for 1960s theorists of the militant Left "the original *caudillo-pensador* [and] an exemplary model of a scholar who renounced his books for a life of military action" (qtd. in Miller 127), Chávez's discussions of twenty-first century socialism have not completely ignored the literary dimension of intellectual history. In fact, in his presidential acceptance speech, Chávez moves well beyond referencing Bolívar, as he cites Walt Whitman and "invokes Galileo, José Martí, Miguel Ángel Asturias, Pablo Neruda, Pedro Mir, Pope John Paul II, [and] Gabriel García Márquez" (Conway 157).

The following analysis utilizes such overtures to literary culture as a point of departure to argue that Chávez, despite publically distancing himself from institutional intellectual practice, is particularly invested in subtly inscribing himself within the intellectual tradition in Latin America. In a certain sense, he seeks to reenact various historical models in the same way that he adapts Bolívar's name and legacy. This is visible in *El Libro Azul*, available in book format or online as an open-access document, in which Chávez presents the theoretical foundation of his particular brand of Bolivarianism as being just as rooted in the words of nineteenth-century military generals such as Ezequiel Zamora as it is indebted to intellectuals such as Bolívar's mentor Simón Rodríguez.

Yet it is important to recognize that his models are not only Latin American. The *Prison Notebooks* (1971), written by Italian Marxist Antonio Gramsci during his incarceration under Mussolini, have dominated the discourse of the Latin American Left since their translation into Spanish and their subsequent university dissemination in the 1970s (Miller 14). Gramsci's theories have also played a critical role in the region's reengagement with civil and participatory society. His characterization of

social hegemony in terms of cultural and moral leadership, the territory of intellectual engagement, offers a "tripartite system in which economy, politics, and civil society were on an equal footing" (Smilde 12). A similar triangular relationship is evident in Chávez's three-pronged political philosophy in *El Libro Azul* constituted by Bolívar, Rodríguez, and Zamora. In addition to incorporating Gramsci's primary emphasis upon civil society and politics over economics, however, Chávez has also reenacted the experience of Gramsci as an intellectual model, producing his own writing in jail before being pardoned for his organizational role in the failed 1992 coup d'état. The current president has repeatedly incorporated this political philosophy into his public platform, in essence canonizing it through governmental, rather than literary, publication and institutionalization.

In order to explore such a relationship with Gramsci and briefly examine a selection of texts produced by Chávez while incarcerated in San Francisco de Yare Prison from 1992 to 1994, it will be important to contextualize Chávez's ambiguous relationship to contemporary Venezuelan intellectuals as well as the tradition of intellectual thought in Latin America. The prison texts include the MBR-200 manifesto "¿Y cómo salir de este laberinto?" and Chávez's "Mensaje Bolivariano," which marked the one-year anniversary of the failed coup. It is during his incarceration that the Venezuelan leader first publicly defines his populist movement, publishes his philosophy as symbolically linked to historical models, and begins to develop the campaign against neoliberalism upon which he continues to appeal to his primary support base.

The *Caudillo-Pensador*

One of the primary challenges facing a discussion of intellectuals is the continued difficulty posed by defining their social role(s). In contrast to historical associations with the elite, Miller argues that the term's usage in twentieth century Latin America does not simply connote a sociological class of lettered individuals who have received higher education, but rather "cultural *caudillos*" who have gained recognition for their leadership in society (5). At the same time, while the intellectual has traditionally been tied to his or her capacity as a writer, Miller argues for such status on the basis of creative rather than propagandistic criteria, thus she discounts figures that have written primarily for political purposes, such as Fidel Castro and Ernesto Guevara. Nonetheless, the juxtaposition of the notion of culture with that of the *caudillo*, a term for political-military leaders that has a long history in Latin America, invokes images of an aggressive support for social progress, perhaps similar to the above characterizations of Bolívar as a *caudillo-pensador*, a status to which Chávez would seem himself to aspire, though epithets have often not included the notion of a thinker or philosopher.

Attempts to locate the Venezuelan President's policies within existing Western paradigms have prompted numerous comparisons with strong-armed historical leaders, and the field extends beyond Fidel Castro and Latin America. What such comparisons often signal, however, is a focus upon *caudillo* rather than *pensador*, as well as personality over politics, and this is equally visible in the less flattering comparisons to which Chávez has been subjected. For example, when Spanish newspaper *El País* began in November of 2010 to publish the Wikileaks cache of secret US embassy cables, not only North American relations with Middle Eastern powers were strained. Latin American neighbors too were exposed, as newspaper *El Universal* revealed that in 2007 then-Colombian President Álvaro Uribe had compared Hugo Chávez and his "Bolivarian revolution" in a meeting with US officials to the threat of Hitler ("Uribe comparó" n.p.). This was not the first time Chávez's name had appeared in conjunction with Hitler. United States Defense Secretary Donald Rumsfeld made a similar comparison one year earlier, in a *non sequitur* suggesting that the Venezuelan president's attempt at "consolidating power" somehow equated to fascism, despite having been voted into office legally ("Rumsfeld Likens" n.p.).

A comparison—albeit facile—of the two controversial twentieth century leaders might conceivably be launched by proposing a similar trajectory in each man's rise to power, for both attempted to overthrow existing governments, gained fame and public support for their outspoken self-defense at their trials, wrote works that became central to their political tenures while in prison (in the case of Hitler, *Mein Kampf*), and emerged as contenders for leadership upon their release.² In fact, García Larralde has developed the argument that Chávez's rhetorical strategies of twenty-first century socialism are closely related to that of Nazi fascists (588), though it seems doubtful that either Uribe or Rumsfeld had any intention other than defamation via the evocation of Hitler's name. Such dramatic associations only strengthen the sensation that Chávez's image is a wandering signifier used to various political ends, while his words are lost before translation.

At stake, then, is more than the characterization of Chávez's maligned international image, but rather to his own self-perception. It is no accident that in 2009 he offered as a greeting to President Obama a copy of a book: Eduardo Galeano's *Las venas abiertas de América Latina* (1971), a history of the exploitation of Latin America. Analyzing Chávez in terms of his cultivation of historical and literary texts provides the opportunity to rethink his discursive strategies and to propose an approach for bridging the gap between the cult of his personality on the one hand and his personal ideology on the other.

To highlight written production in addition to verbal discourse, in another manner of speaking, is to extend analysis beyond "el papel de Chávez," or the role of Chávez in politics, to instead focus upon "el Chávez de papel" as a textual construction. This notion of paper is distinct from that intended by a 2003 Venezuelan collection of anti-Chávez newspaper editorial pieces that invents this very title *Chávez de Papel* in allusion to a paper tiger, suggesting an absence of presidential substance. Ironically, in the process of writing critically about him, these authors too create their own paper Chávez as an ideologically typecast figure, fashioning a textual Chávez whose polarizing capacity parallels the television media wars that have been fought regarding his image, well before the 2002 media coup. The written word, whether a form of propaganda or a weapon of liberation,³ has allowed Chávez to construct a chameleon-like image, one that is ambiguous and adaptive, notable for its ability to morph given the parameters of whatever political battle is to be fought. Analyzing Chávez's written "script" prior to his election as president is an effective means of abandoning the labyrinth referred to in the manifesto "¿Y cómo salir de este laberinto?", but in this case the labyrinth in question is one constructed of images and stereotypes that saturate the media and over-determine his international image, obscuring the strategies that lie beneath the political process in which he engages.

Chávez and Intellectual Identification

Media attacks on the president are ultimately nothing new from what Humberto Gómez García labels "conservative" intellectuals. As he puts it, since 1997, "se puede leer en la prensa nacional: *El Globo, El Nacional, El Universal*, básicamente, un sostenido ataque contra la figura y la imagen de [Chávez]; de diversos y reputados intelectuales que se ubican en el campo de la derecha política y forman no pocos de ellos parte de la élite cultural e intelectual del sistema, ideólogos de la oligarquía" (90). Of course, Gómez García is equally partisan and therefore critical of the guilty individuals he proceeds to list. Yet he touches upon an important issue: perhaps the nature of Chávez's relationship with intellectuals does shape his reactionary identity and self-presentation to a greater degree than a first glance might suggest.

Zygmunt Bauman has argued that the definition of "intellectual" has historically been a self-definition generated from within a group of people attempting to create their own social role and distance themselves from the rest of a society they view as "Other" (8). This tension is particularly visible in the relationship between Chávez and contemporary intellectuals who criticize his policies. The introduction to *Chávez de Papel* notes that "todas las revoluciones del mundo, desde la francesa hasta la cubana, fueron precedidas por manifestaciones de los más notables intelectuales de su tiempo...La pretendida 'revolución bolivariana' en ningún momento contó con los intelectuales venezolanos." The phraseology suggests that the intellectual ire is in part directed at the lack of inclusion in the political scope of said self-fashioning. This exclusion exists largely because Chávez, in his attempt to define himself in opposition to historical institutions, has side-stepped contemporary intellectuals by simultaneously locating himself in multiple spaces within his discourse, most notably as the heir of a much older intellectual tradition. To evoke Gramscian terminology, a distinction I will more fully develop momentarily, Chávez suggests in his public discourses that he is a man of the people and a product of evolving class conflict, an organic intellectual, though his writing evokes identification with the traditional intellectual. He began cultivating this paradoxical relationship from the moment he took responsibility for the failed 1992 coup in his famous pronouncement, which was surprisingly not only permitted on live television, but also delivered in military fatigues and his iconic red beret: "por ahora, los objetivos que nos planteamos no fueron logrados." In the space of his twenty-second appearance, Chávez transformed from a movement participant into a national mediator.

The claim that Chávez has self-consciously sought to identify himself equally with public and popular intellectuals comes into focus if read in relation to Gramsci's *Prison Notebooks*. As Chávez has made clear regarding his self-defined transition to populism, he is very aware of the power of not only

the image, but also the written and spoken word.⁴ While Chávez has been accused of following Fidel Castro's model of revolution and socialism, his initial writings suggest that he was indirectly cultivating a model that echoed the experience of Gramsci, co-founder of the Italian Communist Party. Both Gramsci and Chávez wrote political tracts in prison, acquiring access to writing materials, even if under the threat of censorship. In fact, Chávez received permission to write his Master's Degree thesis from behind bars. With other jailed coup plotters, he studied Rousseau's *Social Contract* (a frequent reference for both Gramsci, and, of course, Bolívar) and attempted to apply this thinking to the Latin American context (Harnecker 41). Chávez's writing, then, suggests an attempt to utilize Gramsci's theorizations in the same fashion.

Gramsci states in his frequently referenced notebook fragments that intellectuals must be analyzed in terms of their social relations, rather than by their function alone. He argues that all individuals are inherently intellectuals, "but not all men have in society the function of intellectuals... [thus] although one can speak of intellectuals, one cannot speak of non-intellectuals, because non-intellectuals do not exist" (*Notebooks* 9). He also distinguishes between two types of intellectual: traditional (i.e., professional, literary, scientific, and even journalists who regard themselves as 'true intellectuals') and organic (organizing or framing agents evolving out of a particular social class or movement). While the traditional intellectual continues to exist in his/her role during historical transitions based on the power afforded by institutional affiliation, and thus existing independently of political change, the organic intellectual is constantly shifting and emerging with newly dominant classes, borne out of the defining social conditions, and acts as a catalyst to social change. Gramsci concludes that any group aspiring to dominance must "ideologically" conquer traditional intellectuals who inherently represent the dominant culture—a group that has been particularly troublesome to appease for Chávez, yet whose antagonism fuels his anti-institutional persona. Thus it is not surprising that he lauds the role of the independent political actor while critiquing journalists and historians as traditional intellectuals whose contributions are determined by their affiliations.

Indeed, the President would seem to view the contemporary Venezuelan public intellectual with particular disdain. He claims that institutionalized thinkers and writers create an atmosphere of hostility that does not allow organic, committed intellectuals the freedom to express themselves. Miller points out that the term organic intellectual became divorced from its original meaning and from the 1960s onward described any intellectual supporting social revolution (20). Chávez suggests instead that both conservative and liberal public intellectuals are in essence traditional, upholding the hegemony of the State's interests. By placing himself in contradistinction to such privileged status through, for example, the often-repeated discourse of his rural childhood, he by default nominates himself as a means of filling the void of organic engagement in Latin America:

Los intelectuales de izquierda, que no abundan, al menos en estas latitudes, los que de verdad tienen buena formación, porque hubo mucha degeneración aquí en la década de los 70, los 80, se entregaron, se convirtieron en mercenarios de la pluma, muchas veces al servicio de los peores intereses. Aquí tenemos, por ejemplo, a Teodoro Petkoff, escritor, periodista, que además de la degeneración a ese nivel, se convirtieron en tarifados para escribir, alabar a alguien o lanzar líneas de matrices de opinión... aunque aquí se ha venido conformando un grupo de intelectuales que ahora se atreve a expresar su opinión libremente, porque también hay un chantaje muy fuerte, es un chantaje mediático, social. Los intelectuales, al menos en estas sociedades nuestras, aun los de izquierda, normalmente viven por los lugares de la clase media o incluso donde vive la clase media alta, no viven por allá, en la profundidad del barrio. (Guevara 90-91)

In other words, in terms of his public discourse, Chávez does not conceive of himself as an intellectual, and certainly not one of the traditional type.⁵ In fact, much of his appeal to the working class stems from his anti-institutional positioning in relation to the political system in place. But there is a caveat here. The success of his rhetoric of permanent revolution in justifying his role in office depends upon his ability to present himself to the voting public not only as an organic intellectual, but also as a knowledge producer who is equally rural and urban (14), for this allows him to appear as an outsider to a political system that has largely ignored the rural and working classes.

Gramsci's second intellectual categorizations is less universal and less frequently evoked, but importantly, this rural-urban binary anticipates the precarious nature of Chávez's self-fashioning. As Gramsci points out, the rural intellectual is typically traditional rather than organic, in that his function has historically been realized through a firmly entrenched system of local administration and religious institutions, in addition to other agents of an emerging capitalistic society. In essence, Chávez appears to play to an impossible intellectual model that is traditional and organic, as well as urban and rural, all at once, while generally critiquing the social roles of such individuals. Chávez's attempt to straddle the rural-urban distinction is in some ways analogous to his self-denomination as a *caudillo-pensador*, which he expresses through ritualized public expressions of apparent literary scholarship.

Chávez and the Literary Tradition

Supportive critics have argued that Chávez highlights literary culture in his discourse in order to extend the public sphere (Arnoux146-7). Such a reading could have its basis in Chávez's inclusion of Simón Rodríguez as a founder of "Bolivarianismo," in turn emphasizing the importance of education in civil society. Whether a majority of his audience participates in his literary allusions or whether these references simply act as markers of literariness is a distinction that merits further analysis, however, for despite his proclaimed anti-establishment stance, he has at the same time gone to great lengths to locate himself as an intellectual in academic and institutionalized terms. Not only has he published patriotic poetry in the newspapers and gained regard as a Bolivarian scholar, but he has also carefully positioned himself as the descendant of historical intellectuals via his schematic "El árbol de las tres raíces," detailed in *El libro azul*. In this document, he apes the conventions of university-style publications via the use of lengthy scholarly citation, formal structure, and overture to historicization.

The document's title may well serve as an illustrative analogy for Chávez's somewhat paradoxical relationship with the tradition of national knowledge production. Curiously, *El libro azul* evokes Chairman Mao's infamous *Little Red Book* via its title while simultaneously distancing itself from Mao's politics via its color-coding. In the last instance, Gramsci's claim that the political party is precisely the way that marginalized social groups "elaborate" their own organic intellectuals (15) is significant in light of Chávez's construction of the MBR-200 as a civil-military party which, in his prison writing, he specifically claims will never be converted into a political party ("Mensaje" 99-100).

The movement did transform into a political party in 1998, though Gramsci's warning that "many intellectuals think that they *are* the State" (16) must be seen in relation to local contextualization of the intellectual, as Gramsci's Eurocentric examples demonstrate region-specific knowledge. Indeed, Gramsci claims in a brief glossing of Central and South America that neither region historically has had a profound category of traditional intellectuals, a position Ángel Rama's *La ciudad letrada* (1983) directly contradicts by tracing the routes of just such a social group back to the conquest of the New World.⁶ In the twentieth century, Miller points out, far from identifying with the State, Latin American intellectuals have operated in its shadows, never truly deviating from the functionary parameters established by authoritative powers (259).

Sainz Borgo's informative history of the Venezuelan intellectual follows a trajectory that begins with independence from Spain. She echoes Chávez regarding the contemporary scarcity of the country's knowledge workers, but for different reasons—she suggests violent party divisions have destroyed social productivity (179). Nonetheless, there is a certain irony to her conclusion, which, in naming the very roles upon which Chávez founds Bolivarianism—the leader, the teacher, and the militant—opens the door to an unintended interpretation: "El intelectual que es a la vez poeta, militante, ensayista, político, el que indica el camino en la hora de la confusión, ha desaparecido" (214). Even as she writes, of course, there is indeed an individual who has inscribed himself upon the country as a jack of all these trades, and rejecting European and North American models is his revolution.

Unlike *El libro azul*, Chávez's first publication in jail is stark, reproducing the expected style of a military manifesto. Its title "¿Y cómo salir de este laberinto?", however, references his favorite book, García Márquez's historical fiction about Bolívar, *El general en su laberinto* (Marcano 149). In addition to describing the act of reading the novel as "labinenteando," Chávez has made his intention to connect the Bolivarian Movement with the novel's humanized protagonist clear in a variety of public addresses,⁷ though equally important to his analysis of the novel is his establishment of a textual link with Nobel laureate and public intellectual García Márquez himself. Although the manifesto, which started off as nothing more than a small-circulation newsletter and was archived as a founding

document only after Chávez's election (Garrido 140-47), is signed by thirty-three members, the reference to the labyrinth appears universally associated with Chávez himself, for he has become the butt of numerous critical texts that regard him as a general lost in a labyrinth of his own making. Given that García Márquez's novel follows the Liberator after his plan for a united Latin America has failed and as his health deteriorates in his final days, Chávez's embrace of the text may seem counterintuitive, but as the president has argued in public addresses, the value lies in the fictionalized liberator's attempt to maintain his ideals when the political system he has given rise to turns against him. In a historicizing gesture, Chávez proclaims, "Creo que hoy es obligatorio mirar hacia atrás mucho más y con mucha mayor atención para interpretar con la mayor exactitud posible nuestros acontecimientos, nuestras grandezas, nuestras miserias, nuestra tragedia, nuestro laberinto como diría el muy querido Gabriel García Márquez" (*Selecciones* 158).

This example of political stubbornness in the face of defeat is obviously not intended to apply to all leaders alike, for the manifesto expressly calls for the current president's immediate resignation and requests a national forum in order to launch its own program of participation of the masses and effect profound structural changes in society (Garrido 141). Fully aware of the effect that Chávez's television appearance had in 1992, the manifesto appropriates his declaration from that moment to conclude its call to arms: "El Ejército Bolivariano no fue derrotado. Bajo las banderas populares, desgarradas y vibrantes, oye, mira, siente...Y espera ¡Por ahora!" (Garrido 136).

The movement's claim centers on issues of representation, in what may be a reference to the 1989 Caracazo street protests that motivated the group's decision to organize the ensuing coup: "si los intereses de las minorías apátridas continúan imponiéndose, el proceso de conflictos sociales violentos seguirá su expansión indetenible" (145). Does the minority blamed, however, represent the interests of the government or a particular class? Gramsci distinguishes between the private level of civil society and the public one of the State; while the latter enacts direct domination over its citizens, the nature of societal organization is such that social hegemony manipulates the culture of citizens through ideological means. As he explains, the "intellectuals are the dominant group's 'deputies' exercising the subaltern functions of social hegemony and political government" (*Notebooks* 12). Their duty is to disseminate the ideology that will act to control the population's beliefs, though such a characterization would make the Bolivarian Movement's allegations regarding the ruling minority applicable to traditional intellectuals and politicians alike. While the manifesto emphasizes the State's direct exercise of control, the transitional plan that the manifesto proposes invokes civil participation but in fact relies upon direct military intervention.

This rhetoric shifts in his second prison publication, titled "Mensaje Bolivariano del Comandante," which was released on the one-year anniversary of the 1992 coup during the time that Chávez was still authorized to be working on his Master's Thesis on political transformation. The nature of the writing is more philosophical than the emotive manifesto, with Chávez analyzing the supposed era of the end of ideology ("Mensaje" 80). Although he had previously linked the three men who constitute the roots of his tree of reform, it is here that he first publically details their relationship, covering all bases of the *caudillo-pensador*: militant and poet, for while Bolívar and Zamora represent men of military action, Rodríguez is one of the founding *pensadores* of post-independence Venezuela (Sainz Borgo 6-7).⁸ In an attempt to downplay the opposition's critique of "Chavismo" as a euphemism for *caudillismo*, Chávez writes that the cult of his personality is a creation on the part of institutional intellectuals seeking to discredit him as "other": "Pienso, más bien, que algunos intelectuales del régimen y otros, que sin darse cuenta, le siguen el juego, han estado arrimando su brasa a un proceso que trata de distorsionar la realidad colectiva en mito, como una forma de apagar la llama de la rebeldía que ahora lleva encendida el alma nacional ("Mensaje" 90).

Once again, Chávez discursively distances himself from such lettered types and traditions, before ironically quoting Aristotle in support of his argument (91), yet it is clear that his current project falls into a Venezuelan intellectual tradition that Sainz Borgo traces from independence ideologues to the early twentieth century novelists; both ideologues and novelists unsuccessfully attempted to conceptually found the nation in successive centuries (25). Is Chávez's nationalistic utopia a novelistic invitation to repeat that process of myth-making in the twenty-first century? Is it possible to maintain intellectual status as both in and outside the dominant group in power? The answer to these questions will only be borne out by the manner in which the subsequent transition of political power takes place, whenever it takes place. For now, in Chávez's able hands, both nation and intellectual become literary

figures, tropes that, like his curious rendering of the concept of utopia, "comienza a existir en la imaginación del colectivo" ("Mensaje" 91).

Conclusion

Sainz Borgo's genealogy of Venezuelan intellectuals ends by focusing upon Chávez, not because she wishes to incorporate him into the list of important writers, but rather because she believes that his presence is limiting the capacity of the literati's engagement with public issues. Her concern is that socially minded poets, whose comments upon intellectual and political developments remain viable, have lost the political sphere in which to operate within the last decade. She points to Chávez's paradoxical relationship with the media as an important reason. While he has self-consciously utilized positive media coverage as propaganda, in the wake of the media coup in 2002, he has engaged in forms of censorship against critical outlets. She wonders at the repetitive effects of his television show *Aló Presidente* upon his viewers, asking, "¿Cabe el intelectual entonces en esa pequeña pantalla donde todo juega también a los opuestos?" (191). Miller has argued that the Latin American intellectual has not been able to act as a legislator or an interpreter of culture in the twentieth century; instead, these individuals have attempted to act as mediators between the government and the masses (132-33). It would seem that Sainz Borgo's criticism in essence results from Chávez's failure to mediate between these two groups, polarizing them instead.

Bauman may claim that all intellectual definitions are ultimately self-definitions made from within intellectual groups, but whether Chávez's attempts at defining himself within the Latin American intellectual tradition are ultimately any more successful than his attempts at class mediation is beyond the scope of this paper. What Gramsci notes in his discussion of the hegemony of Western Culture may be equally applicable to Latin American civil society: "It is not important that this movement had its origins in mediocre philosophical works, or at best, in works that were not philosophical masterpieces. What matters is that a new way of conceiving the world and man is born and that this conception is no longer reserved to the great intellectuals" (417). More important than gauging Chávez's success or failure, then, is recognizing the strategies implied in the process of intellectual self-fashioning that is at once collective and exclusive. Engaging with Chávez *in* his terms (though not necessarily *on* his terms) of this written and rhetorical strategy provides an opportunity to move beyond military characterizations of his policies and his ideology, potentially suggesting new strategies to successfully engage him in a dialogue that is national, regional, and hemispheric in its scope.

Notes

¹ Although the acronym "EBR" would eventually transform into "MBR" in order to emphasize a movement rather than a militant group, it initially performed a doubly-symbolic role. Each letter also referenced the name of the nineteenth-century heroes who would act as "el árbol de las tres raíces," Chávez's conceptual political system: Ezequiel Zamora, the lauded military leader during the civil war; Simón Bolívar, the Liberator; and Simón Rodríguez, the teacher and educational reformer. The members of the covert military cell added the number "200" in order to mark the two-hundredth anniversary of Bolívar's birth in 1783 (Jones 80).

² By the same token, similarities in Chávez's political trajectory with other Latin American leaders in the twentieth century, such as Fidel Castro, regarding his own public arrest and subsequent political entrance, and to a certain extent Juan Perón before him, would provide a more plausible context.

³ Subcomandante Marcos began rhetorically championing the power of words as weapons during the Zapatista uprising that began in 1994. See Hayden's *The Zapatista Reader* for a collection of Marcos' online manifestoes and broadcasts.

⁴ As he explained to Aleida Guevara in a series of interviews, "Nosotros tenemos una revolución pacífica, pero armada...estoy hablando de armas de guerra. Además, están las armas de la ideología, de la constitución, de la conciencia" (20).

⁵ As Gilman notes, even the apparent distance from intellectual activity can be an intellectual stance; anti-intellectualism was a particular strategy adopted by self-identified radical intellectuals who sought

to differentiate their revolutionary practice from traditional perspectives regarding the so-called critical ideal (29-30).

⁶ Rama characterizes the Latin American lettered man from the colonial era through the independence movements of the nineteenth century as someone who places himself in service to the Spanish crown—or later, the governing State powers—by using privileged access to the written word to solidify government codes and control the national population.

⁷ In a 2001 lecture, for example, he revisited the creation of the document, explaining that “nosotros, aquel pequeño grupo de hombres que estábamos allá encerrados en unas celdas en Yare, pues, presentamos este documento: ‘El Movimiento Bolivariano Revolucionario 200 (MBR 200) una propuesta, y cómo salir de este laberinto.’ Tomado, ustedes saben de aquella expresión de Gabriel García Márquez ‘el Gabo’ en su novela extraordinaria: ‘El General en su Laberinto’: ‘¿Cómo salimos de este laberinto?’” (Selección de discursos 452).

⁸ In fact, Rama portrays Rodríguez as one of the first intellectuals to attempt to break away, albeit unsuccessfully, from the complicit relationship with the State. Whether Chávez understands the educational reformer in these terms or only in relation to Bolívar is not clear.

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Book Review

Arthur P. Whitaker Prize, 2011

Andrews, George Reid. *Blackness in the White Nation: A History of Afro-Uruguay*. Chapel Hill, NC: The University of North Carolina Press, 2010.

Elizabeth Kiddy

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Recent work in Latin American History has uncovered some surprising new insights on nation and identity, especially African identity within traditionally self-identified white nations. George Reid Andrews, Distinguished Professor of History at the University of Pittsburgh, was one of the founders of this line of research, and continues to be a major contributor to this growing field. His first monograph, *The Afro-Argentines of Buenos Aires, 1800-1900* (University of Wisconsin Press, 1980) paved the way for a whole generation of scholars interested in exploring the African past of Latin America outside of Brazil and the Caribbean. His general history, *Afro-Latin America, 1800-2000* (Oxford University press, 2004) offered a comparative look at the history of blackness in Latin America, and became an important text in classrooms exploring the topic. Andrews' new work, *Blackness in the White Nation: A History of Afro-Uruguay*, published by The University of North Carolina Press, provides another important contribution to this emerging field. This monograph explores the history of Africans and their descendents, and their interface with the increasingly self-identified "white" nation of Uruguay, from 1830 to the present. His main argument is that although the Afro-Uruguayan cultural expression called *Candombe* has helped Uruguayans be aware of the presence of an African past, it has done little to lessen racial stereotypes and break down discriminatory practices in that nation.

Candombe is at the center of this story and it runs like a thread throughout the book. Candombe is a tradition of singing and dancing that emerged in the Rio de la Plata region, both in Buenos Aires and Montevideo, among the enslaved population in the late colonial period. In both places Candombe was born in the groups of African "nations" which gathered together when they could, mostly on Christian holidays, to crown their kings and queens, play their drums, dance and sing, and engage in mock battles – very much what black confraternities did in other Latin American nations. The Uruguayan elite expressed some concern about the Candombe, but it was never banned outright. Instead, it was relegated to the barrios outside of the walls of the city – a region known as the Recinto (today Barrio Sur). The "nations" were essentially black civic societies, according to the remarkable black lawyer that represented them, Jacinto Eusebio de Molina. Molina was a self-taught lawyer, the son of a freed Angolan slave, who became a mediator between Africans and the white population and its institutions in the first half of the nineteenth century. In his defense of the rights of these groups, Molina attempted to translate them into a language that white Uruguayans would understand – civic societies that helped to civilize the Africans. Little could he have known how fervently that same white Uruguayan society would embrace Candombe just a few decades later.

In the second half of the nineteenth century, after the Uruguayan Civil Wars, the Candombes came to be the most popular entertainment in the city, drawing crowds of whites and blacks in huge numbers, and by the end of the nineteenth century they had come to be an integral part of carnival and embraced as an expression of Uruguayan national identity. There were several black *comparsas* (carnival groups) that played Candombe, as well as comparsas of young white men who paraded in blackface and called themselves the *Negros Lubolos*. Soon other blackface groups emerged. Chapter two is dedicated to this period, when the Candombe made this transition from marginal African expression to the central expression of Uruguayan identity. In the chapter, Andrews discusses the ways that the different groups expressed their criticism of discrimination, while at the same time reinforcing stereotypes. For example, the blackface groups would criticize discrimination in their lyrics, but were responsible for creating the main two characters in the present day Candombe, the *gramillero* (herb doctor), who epitomizes the old black man, and the *escobero* (sweeper) who represents the stereotype of the young, virile, and agile black man. Later, the female figures would

be added – the *mama vieja* (old mother), the stereotype of the old black woman who would dance with the *gramillero*, and in the mid-twentieth century the *vedette*, or the sexual dancer of mixed descent at the front of the group. This latter figure, which was essentially the stereotyped sexually available *morena*, had already become an object of desire in the songs of the Candombe. These characters, and the stereotypes they embody, would persist to the present, despite a growing awareness of discrimination as the years progressed.

Andrew's relationship to the Candombe feels personal throughout the book, and in chapter three the reader discovers that Andrews indeed spent several months practicing, and finally parading, with the Candombe group Mundo Novo (New World). The chapter begins with the emergence of the modern celebration of Candombe during the Uruguayan carnival – a night known as the *llamadas* (the calls). This is the night of carnival dedicated solely to the black comparsas that began to great acclaim in 1956. In the 1970s and 80s, white males began again to be interested in participating in these organization, and now the "black" Candombes are filled with white participants, like Andrews. In addition, women also began to participate more in the 1970s and 80s, and now there are women in the groups as well as groups comprised of all women. Despite the new diversity in the groups and the Uruguayan embrace of Candombe as an expression of national culture, discrimination continues in Uruguay.

The backdrop of the story of Candombe, and that which many groups pushed against, was a Uruguay that denied that racial discrimination existed. Uruguayan leaders, like many leaders in Latin America, argued that inequalities were primarily a result of class differences, not racial, and that no barriers existed for blacks to get ahead. Racial discrimination existed, however, which Andrews amply demonstrates both through case studies and quantitative data. One response to this racism was the publication of black newspapers and the formation of social organizations, such as mutual aid societies and clubs, exclusively for blacks. Candombe itself was created within a form of these early mutual aid organizations. After the end of slavery and the mid-century wars that rocked Uruguay, these organizations would take on characteristics that paralleled similar white organizations, and would be much more political in their outlook.

In the 1870s, Afro-Uruguayans started black newspapers with the aim of gaining more say in the political process. They argued that blacks had a right to participate fully in the political life of the nation both because the constitution granted that right, and because blacks had been especially active in military service during the mid-century wars. Interestingly, the founders of some of these newspapers, such as *El Progressista*, sought to distance themselves from Candombe, which they equated with uneducated blacks who aligned themselves with the strongmen leaders of the two major political groups. Instead, the editors of the newspapers argued that blacks had to become part of the new, liberal, movement that relied on law and education to get ahead, not the barbarism of the *caudillos*. Nonetheless, during this period even when blacks did succeed in getting a university education they were still barred from participating in public administration – the main avenue for entrance into the middle class.

In the mid-twentieth century a convergence of factors such as increased urbanization and industrialization, as well as the introduction of revolutionary Marxist ideas, led to the emergence of the idea of the "new Negro" throughout the Western Hemisphere and Europe. Many black Uruguayans embraced this movement. The newspapers and groups that emerged as a result of this intellectual movement, such as *La Vanguardia* and *Nuestra Raza*, were much more forthright in their assertion of the need for racial equality than their predecessors had been. In addition, they tied themselves more closely to international movements against racial discrimination than earlier groups had done. The realization of the "new Negro" also led to the creation of Uruguay's first political party of color, the Partido Autóctono Negro, in 1936. The party was never successful and slowly dissolved away after one election, which left the fight against discrimination back in the hands of the newspapers and social clubs.

Not all black groups and newspapers, however, agreed that discrimination was imposed by Uruguayan society. The longest running black social club in Uruguay, the Asociación Cultural y Social Uruguay (ACSU), started in 1940 and is still active today. In its magazine, *Revista Uruguay*, the ACSU argued that the cause of discrimination stemmed from the blacks themselves. They asserted that blacks did not take advantage of the opportunities that existed in Uruguayan society. The leaders of the ACSU also believed that one way that white Uruguayans would better come to appreciate black society would be through the appreciation of black culture. It was for this reason that the ACSU

suggested that the black comparsas have their own night to parade – a night they called the Llamadas. Although the group originally thought the llamadas should occur on a night separate from Carnival, soon they became the central aspect of the Uruguayan carnival.

By the 1980s many young Afro-Uruguayans felt that the ACSU was not really addressing issues of social inequality and poverty, but was only interested in maintaining the appearance of a false middle class. After a bitter fight in 1988, some of the youth of the ACSU branched off to form a new organization, Mundo Afro. This organization set out to confront several of the issues facing Afro-Uruguayans, including poverty and their invisibility vis-à-vis Uruguayan national consciousness, but the issue they confronted most forcefully was that of discrimination. Mundo Afro kept up a consistent message of the problems of discrimination in Uruguay, calling on international organizations such as the United Nations to acknowledge the problem. In fact, in 1999 the United Nations Committee for the Elimination of Racial Discrimination wrote a report that exposed Uruguay's racial discrimination, urging the Uruguayan government to take decisive steps to help to offset the structural imbalances that years of racial discrimination had incurred. Yet Candombe has also produced leaders who are willing to confront discrimination. In recent years, some of the major congressional challenges to racial discrimination have come from a *Candombero*, Edgardo Ortuño, who was first elected to the Uruguayan legislature in 1999. He is only the second self-identified black deputy in Uruguay's history, and, despite some initial reluctance, has taken concrete steps to address the structural forms of racial discrimination in Uruguay.

The story of Candombe and efforts by black organizations, social clubs, and their newspapers to fight racial discrimination are intertwined. From Molina representing the Candombes in the early nineteenth century to the *candombero* Ortuño fighting against discrimination in the Uruguayan legislature, Candombe has always been at the center of the Afro-Uruguayan story. Yet it is not the only story, as Andrews urges us to acknowledge, and its role in the story is not always that of helping to promote the cause of equality. For example, is not surprising that the black social club that embraced Uruguayan ideas of racial democracy would be the organization that promoted the elevation of the black comparsas to the national scene. Andrews points out, however, that despite the appreciation for and national pride in the Candombes, they do little to address questions of racial discrimination in Uruguay, which returns to Andrews' original point. Although white Uruguayans embraced Candombe as a national culture, that very embrace masked very real forms of discrimination, both structural and cultural. The conclusion at which Andrews arrives is that Candombe has done little to change the face of racial discrimination in Uruguay, in fact it has promulgated both gender and racial stereotypes that may have actually slowed progress towards a more equitable society.

Andrews has once again provided a solid piece of research that helps to expand and complicate our understanding of race, nation, and identity in Latin America. Andrews might have considered doing more with comparing the multiple meanings of Candombe to similar work done on other cultural expressions in Latin America, such as John Charles Chasteen's work on the samba for example. A theoretical discussion of the complex role of culture in creating national identities would have made an already excellent book even better. Nonetheless, *Blackness in the White Nation: A History of Afro-Uruguay* is an important addition to a growing field of work on blackness in Latin America. It will work well as a text in an undergraduate or graduate course in the history of race in Latin America, or in a class about the multiple and layered meanings and functions of culture in the construction of national identity.

IN MEMORIAM: DR. JACK CHILD

Brian Turner

Randolph-Macon College

Professor Jack Child of American University was the very model of a distinguished career of scholarship, teaching, and service to the profession. He published fourteen books and monographs, including *Miniature Messages: The Semiotics and Politics of Latin American Postage Stamps* (Duke UP, 2008), for which Jack was awarded the MACLAS Arthur P. Whitaker Prize. He also published countless book chapters and articles in journals such as the *Studies in Popular Culture in Latin America*, *Latin American Research Review*, *Third World Affairs*, and *Journal of Interamerican Studies and World Affairs* to name just a few. His "Latin Lebensraum: the Geopolitics of Iberoamerican Antarctica," (*Applied Geography* 1990) was awarded the Harold Eugene Davis Prize in 1991. He was also a regular contributor to our own *Latin American Essays*, and was awarded the James L. Street Prize in 2001 for "The Central American Peace Process: The Role of International Organizations." Thus, Jack was a "triple crown" recipient of the three faculty awards given by MACLAS.

Such a brief listing fails to reveal the incredible range of research interests and the media used for the dissemination of his research that truly distinguishes Jack's career. He wrote on postage stamps, geopolitics, peace processes, literature, translation, pedagogy, history, and military affairs, again, just to name some of his interests. Jack was truly a leader in the use of computer technology in the classroom and publication. A highlight of most every MACLAS conference was Jack's presentation, at which the audience could expect fascinating research presented through exciting new technologies, or familiar technologies used in novel ways. If you read Wikipedia entries in these fields, you may be reading an article posted by Jack. And he famously photographed penguins during his many trips to Antarctica.

Jack served his institution and the profession in many other ways. At American University, he served as Assistant Dean in the School of International Service, Director of the English Language Institute, and was the Founding Director of the Center for Teaching Excellence. He was awarded both the University Faculty Administrator Award (2001) and the University Award for Teaching in the General Education Program (1998). Jack also served his country, retiring as a Lieutenant Colonel from the U.S. Army after 20 years of active duty. In the military he was a Foreign Area Officer (Latin America) and spent two years on the faculty of the Inter-American Defense College.

Of course, Jack Child was a founding member of MACLAS and the original Newsletter Editor, and was the MACLAS president 1986-1987. Jack was also the one who selected the MACLAS icon, taken from a Bolivian postage stamp image of the central gate at Tiwanaku, used on the first Newsletter and on MACLAS publications ever since.



Editor's Note: *This article was adapted from a letter written by Brian Turner to the Executive Council of MACLAS in order to nominate Jack Child for the Judy B. McInnis Distinguished Service Award in 2012. The Executive Council voted unanimously in favor of this recipient, and the award was presented posthumously to him at the 2012 MACLAS conference at American University. His wife, Leslie Morginson-Eitzen, and their son, Andrew, accepted the award on Dr. Child's behalf. We, the Editorial Staff of Latin American Essays, dedicate this journal edition to him for his exceptional contributions to MACLAS.*

MACLAS PRIZE WINNERS - 2011

Arthur P. Whitaker Prize for the best book published by a MACLAS member in 2009-2011:

George Reid Andrews, Distinguished Professor and Chair, Department of History, University of Pittsburgh: *Blackness in the White Nation: A History of Afro-Uruguay* (UNC Press, 2010).

Honorable Mention, Arthur P. Whitaker Prize: Betsy Konefal, Assistant Professor of History, College of William and Mary: *For Every Indio Who Falls: A History of Maya Activism in Guatemala, 1960-1990* (University of New Mexico Press, 2010).

Honorable Mention, Arthur P. Whitaker Prize: Regina Root, Associate Professor of Hispanic Studies, College of William and Mary: *Couture and Consensus: Fashion and Politics in Postcolonial Argentina* (University of Minnesota Press, 2010).

Harold Eugene Davis Prize for best article published by a MACLAS member in 2009-2011:

Brian Turner, Professor and Chair, Department of Political Science, Randolph-Macon College: "Paraguay: *Muchas novedades y poco cambio*/Paraguay 2009: Many Differences and Little Change," *Revista de Ciencia Política*, vol. 30, no. 2 (2010): 439-450.

Street Prize Essay for best article published by a MACLAS member in the 2010 volume of *Latin American Essays*:

Consuelo Hernández, Associate Professor, Spanish and Latin American Studies Program, American University: "El Inmigrante como sujeto polidimensional en *Viaje a la tierra del abuelo* de Bencastro."

John D. Martz III Prize for best graduate paper presented at the 2010 MACLAS XXX

Conference: Laura Romah, American University, MA Candidate. "Engaging Men in Gender Equality Programs: The Case of Nicaragua."

Juan Espadas Prize for best undergraduate paper presented at 2010 MACLAS XXX

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