

**Spanish America Cultural Orientation** 

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Antigua, Guatemala © Pedro Szekely

# **Chapter 1: Introduction**

# Introduction

atin America in the context of this document refers to the Spanish-speaking countries of the Western Hemisphere.<sup>1</sup> The term Latin America is an invention of the French, who coined it when Napoleon's nephew instigated rule in Mexico in the 1860s. Latin American nations have different histories and different cultures. Yet, they are bound by their shared colonial history, Catholicism, and the mixing of indigenous and European populations.<sup>2</sup>

Latin America has become increasingly significant to the United States in recent years and ties with the region have deepened. Latin America is the largest supplier of oil to the United States, the largest source of immigrants, and one of the United States' fastest-growing trading partners, as well as a major supplier of illegal drugs.<sup>3</sup> Regional economic growth has done little to eliminate poverty or increase political stability. Poverty in Latin America ranks among the highest in the world as measured by per



capita GDP (gross domestic product) and represents a serious source of potential instability.<sup>4,5</sup> In 2010, only 5 Latin American countries had poverty rates lower than 25%, while 3 countries had rates higher than 50%.<sup>6</sup> Violence and instability in the countries of the region are on the rise. Crime rates in Central America are higher than ever, even though civil war has receded.<sup>7</sup> The United States is developing new policies to guide its international relations with Latin American nations. Strengthening cooperation in the region ultimately depends on the individual countries, but the United States has an important role to play. Success in this area will require a greater understanding of Latin America's social, economic, and political issues.<sup>8</sup>



Painting of Christopher Colombus © Sebastiano del Piombo

# **Historical** Overview

olumbus first landed on the Caribbean island of Hispaniola in 1492, during his first voyage to the New World. He landed on the island of Cuba later that year. Spain dispatched expeditions from these islands to the rest of the Americas.9 Columbus journeyed to Venezuela in 1498 and a year later European explorer Amerigo Vespucci traveled to South America. 10 Although Columbus had traveled the coast of Central America, no serious attempts were made to settle the region before 1510. The Spanish had explored portions of South America and Mexico by 1520 and crossed the isthmus in Panama to the Pacific Ocean. From there they launched explorations of South America's west coast. 11, 12, 13

In 1524, the Spanish began to explore Peru and by 1533, the land was under Spanish control. <sup>14</sup> The Spanish spread from Peru throughout the rest of South America. They eventually conquered the area of the modern-day nations of Colombia, Chile, and Argentina. <sup>15</sup> In the 1520s, the Spanish

also began intensive exploration and colonization efforts in most of Central America. All but the most remote regions of Central America had come under Spanish control by 1564. Fain maintained control of its New World empire for about three centuries. Between 1810 and 1825, all of the colonies except Puerto Rico and Cuba had achieved independence from Spain. Puerto Rico remained a Spanish colony until the end of the Spanish-American War in 1898. At that time, Puerto Rico became a protectorate of the United States, a status it still holds. Cuba achieved total independence from Spain in 1902. Puerto Rico Beautiful Puerto Rico Puerto Ric





View of Trinadad, Cuba © Nathan Laurell

# Geography

#### The Countries

he 19 Spanish-speaking countries in the Americas are divided into four geographical regions: the Caribbean, North America, Central America, and South America. The Spanish-speaking countries of the Caribbean are Cuba, the Dominican Republic, and Puerto Rico. Mexico is the only North American country in which Spanish is the official language. The six Central American Spanish-speaking countries are Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama. The nine South American countries

where Spanish is the official language are Argentina, Bolivia, Chile, Colombia, Ecuador, Paraguay, Peru, Uruguay, and Venezuela.<sup>21, 22</sup>



Amazon River in Peru © AmazonCARES / flickr.com

## **Topography**

Latin America stretches approximately 8,851 km (5,500 mi) from the southern border of the United States to Cape Horn at the southernmost tip of South America. It is bordered by the Pacific Ocean to the west and the Atlantic Ocean and Caribbean Sea to the east.<sup>23</sup> Much of the region is made up of mountains or highlands. La Cordillera mountain chain extends from the Rocky Mountains through the Sierra Madres of Mexico and Central America, continuing 7,742 km (4,810 mi) along the western coast of South America, where it is known as the Andes.<sup>24, 25, 26</sup> The Andes is one of the world's highest mountain ranges, with some peaks rising above 6,096 m (20,000 ft).<sup>27</sup> Central America is home to the Central Highlands, a ridge of volcanic

mountains. Argentina, Venezuela, Colombia, and Uruguay are characterized by broad plateaus and grasslands, as well as some mountains.<sup>28</sup>

The region is filled with waterways used for irrigation and transportation. Most of the major rivers are in South America; the main exception is the Rio Grande River (or Rio Bravo), which forms part of the border between Mexico and the United States. South America's largest river is the Amazon, which drains portions of Bolivia, Peru, Ecuador,



Colombia, and Venezuela. The second-largest river system is formed by the Paraná, Paraguay, and Uruguay rivers in the eastern section of South American.<sup>29</sup>

Latin America has few major lakes. Among the most important is Lake Titicaca, the world's highest navigable lake. Lake Titicaca sits at an elevation of 3,810 m (12,500 ft). It is located in the Andes Mountains on the border between Peru and Bolivia.<sup>30, 31</sup> Venezuela's Lake Maracaibo contains most of Venezuela's oil reserves and is the continent's largest lake. Lake Marcaibo covers 13,280 sq km (5,130 sq mi).<sup>32,33</sup> The largest Central American lake is Lake Nicaragua. This lake is known locally as Cocibolca and is located between Nicaragua and Costa Rica. The lake covers an area of 8,157 sq km (3,149 sq mi). Lake Nicaragua reaches a depth of 60 m (197 ft) at its deepest point.<sup>34, 35</sup>



Traditional Dancers, Mexico
© Dtraveller Cancun / flickr.com

## The People

Latin America has a combined population of 386,450,091 people.<sup>36, 37, 38</sup> Latin Americans come from a variety of racial and ethnic heritages, but primarily descend from European, African, and indigenous Indian groups. Individuals of mixed race are often designated as mestizo (European and indigenous Indian ancestry) or mulatto (African and European ancestry).<sup>39, 40</sup>

Approximately 40,000,000 Latin Americans belong to the more than 600 indigenous groups in the region. About 40% of the indigenous inhabitants reside in the rural areas of their respective countries. Mexico, Peru, Guatemala, Bolivia, and Ecuador have relatively large numbers of indigenous groups.<sup>41</sup> In the Caribbean, most of the

indigenous population was eradicated in the early years of Spanish colonization. War, disease, maltreatment, and migration nearly decimated the indigenous population. The ability of these groups to preserve their cultural traditions in modern times is being threatened. Many have had to migrate to cities to make a living. Persistent racism often keeps these groups marginalized and limits their political and social participation. The ability of these groups marginalized and limits their political and social participation.

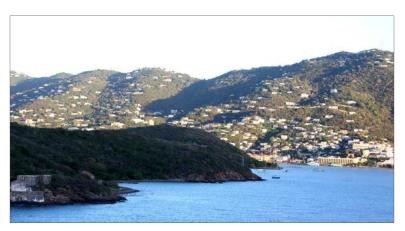
Several nations have large European populations. Ninety-seven percent of Argentina's population is of European descent, with most Argentinian people of Spanish or Italian ancestry. Other countries with large European descent populations are Chile (89%), Uruguay (88%), and Puerto Rico (76%).<sup>44</sup>

In many countries, particularly in Central America, mestizos are the predominant ethnic group. Countries where at least half of the population is identified as mestizo are



Paraguay (95%), Honduras (90%), El Salvador (86%), the Dominican Republic (76%), Panama (70%), Nicaragua (69%), Mexico (60%), and Colombia (58%). 45

People of mostly African descent and mulattoes often make up the smallest ethnic groups in a nation. Countries with significant mulatto populations are Colombia (14%) and Costa Rica (7%). Those nations with identifiable African descent ethnic groups include Peru (15%), the Dominican Republic (11%), Cuba (10%), Nicaragua (9%), Ecuador (7% Afroecuadorian), Uruguay (4%), Honduras (2%), and Costa Rica (1%). However, these numbers may be low. A 1996 study suggests that as many as 33% of Latin Americans may have some African heritage. Racism may lead many to self-identify himself or herself as mixed race, rather than as black. 47



St. Thomas, Carribean
© Craig Hatfield

# **Cultural Overview**

# The Spanish Conquest

he Spanish quickly took advantage of the native inhabitants and their culture when they arrived in the Caribbean.

One of their first actions was to establish the *encomienda* system, in which the indigenous people worked the land held by a Spanish landholder. This system was similar to one that was already in existence among indigenous groups, whereby land was held by a ruler. 48, 49

The *cacique*, or landholder, used indigenous

labor to produce agricultural products and extract minerals from local mines. In exchange, the *cacique* provided protection and education.<sup>50, 51</sup> Aside from agricultural production, the assimilation of the native population into the Spanish way of life was a major goal of the system.<sup>52</sup> Many customary cultural arrangements in the Caribbean carried over to the rest of Latin America, setting the stage for interactions between the Spanish and other indigenous populations.<sup>53</sup>

When the Spanish landed on the shores of Mexico, Central America, and South America, they encountered a situation that differed greatly from the one they had experienced in the Caribbean, where little military action had been necessary.<sup>54</sup> On the mainland, the Spanish found larger and more advanced civilizations that were less easily subdued. These civilizations included the Maya of Central America and southern Mexico, the Aztecs of central and southern Mexico, and the Inca of South America.<sup>55, 56, 57</sup>

After the Spanish conquest of these New World civilizations, the natives were forced into the *encomienda* system. The mainland version exacted tribute and reduced the natives to virtual slaves, unlike the island system.<sup>58, 59</sup> As the native populations declined,



African slaves were brought in to work the *encomiendas*. <sup>60, 61, 62</sup> There was also a need for people to carry out military and other services on the central mainland, thus most of the Spanish were not *encomenderos* (landholders). Many Spanish people who did not own land moved to the cities. There they lived alongside rich landholders and married Spanish women. By not intermarrying, these Spaniards were able to maintain many of their cultural traditions. This led to their becoming the dominant political, cultural, and economic force in the region for many years. <sup>63</sup>



Kids in traditional dress, Panama © Karagines / flickr.com

# The Beginning of a "Latin American" Culture

Latin American culture represents a melding of Spanish, indigenous, and African traditions. Its exact configuration depends on historical circumstance. The lack of segregation between the native and European groups was a significant feature of life in the Americas. Indigenous people often lived among the Spanish in large numbers. Many Spanish men married indigenous women due to high levels of Spanish/indigenous interaction and the insufficient number of Spanish women. Their mixed-race descendants, known as mestizos, are today the largest group in Latin America. However, the percentage of a population

that mestizos constitute varies widely among the nations.<sup>65</sup>

The Spanish adopted a racial classification scheme to deal with the expanding racial diversity in the colonies. The system ranked individuals based on their distances from the pure Spanish ideal. The system became inadequate and fell into disuse, however, as the groups continued to mix. Further, cultural traditions began to meld. This fusion created unique cultures in various parts of Latin America. These unique cultural fusions are based on the interactions of specific regional native groups, African slaves, and the Spanish.<sup>66</sup>

#### Values and Traditions

All Latin American countries share a cultural heritage with Spain, yet each evolved its unique culture based on geography, history, ethnic groups, and circumstance. To speak of a monolithic Latin American culture is inaccurate. Hofstede has identified several broad dimensions that serve to distinguish cultural values.<sup>67</sup> To be sure, there are national differences in these dimensions among the Spanish-speaking countries of Latin America. However, some broad similarities seem to operate throughout the region. To compare Latin American cultural values with those in the United States



provides important insights into how cultures operate. It also provides a deeper understanding of the people.



Women smiling, Guatamala © Lon & Queta / flickr.com

#### Individualism vs. Collectivism

Latin American culture can generally be classified as more collectivist than that of the United States. <sup>68, 69</sup> On the Hofstede scale, scores can range from 0 (completely collectivist) to 100 (completely individualist). Scores on individualism throughout Latin America range from a low of 6 in Guatemala to a high of 46 in Argentina. Across the region, the average score is approximately 20. This compares to a score of 91 in the United States. As a rule, the Central American countries are more collectively oriented than the rest of the region, with scores ranging from 6–20. <sup>70</sup> In collectivist cultures,

individuals are more likely to identify with a group, to place group needs before their own, to value loyalty, and to work cooperatively in groups. Individuals are expected to take responsibility for their fellow group members. Shame and loss of face are to be avoided at all costs.<sup>71,72</sup> Latin Americans tend to regard the family as the most important social group. Individuals are expected to place the needs of their family above their own.<sup>73</sup> Collectivist cultures also avoid direct confrontation. People try to find indirect ways to disagree in order to maintain group harmony.<sup>74</sup>



Men in Panama © Tatiana Travelways / flickr.com

# Masculinity Index

Another key difference between the United States and Latin American countries is on a dimension known as masculinity (MAS). This index measures the extent to which achievement, heroism, assertiveness, and social competitiveness are valued. Scores range from a low of 21 in Costa Rica to a high of 73 in Venezuela. Scores in Central America hover around 40, with the greatest variation among South American countries. This compares to a value of 62 in the United States. A high score on this scale indicates that competition drives the society and there is a clear demarcation between winners and losers. Conversely, a score of 40 indicates that a nation

does not brag about its achievements. Instead, the tendency is to let the results of peoples' efforts speak for themselves.<sup>76</sup>





Smiling girls, Uruguay © Gonzalo G. Useta

## **Uncertainty Avoidance**

Another important aspect of any culture is the extent to which individuals deal with the unknown and how they perceive the future. Scores on this index give insight into the degree to which people feel threatened by ambiguity. Scores also help clarify how cultural beliefs and institutions have been created to help them deal with such ambiguity. Uncertainty scores range from a low of 45 in the Dominican Republic to a high of 99 in both Uruguay and Guatemala. For most of the region, scores are in the 80s and 90s versus a score of 46 in the United States. This suggests that there is a strong need for rules to structure

life. Individuals from such cultures are generally conservative and do not value new and different ideas.<sup>77</sup>



Santiago, Chile © Alobos Life / flickr.com

### Pragmatism vs. Normative

This dimension is a measure of how well people feel they can explain and control events around them. Societies that are more normative are indicated by a lower score. In this case, people feel they need to explain virtually everything around them. Pragmatists, on the other hand, feel that life is too complex to understand fully. The challenge for pragmatists is to figure out how to live in a complex world filled with unknowns. The Spanish-speaking Latin American countries generally score low on this dimension, with scores ranging from 13 in the Dominican Republic to

31 in Chile. Most nations score in the 20s. The United States' score is 26. This can be interpreted to mean that people are concerned with establishing a single truth. They are respectful of traditions, do little to save for a future they cannot control, and focus on achieving quick results.<sup>78</sup>

According to a 2012 poll, 7 of the 10 nations where people are the happiest are in Latin America. This is despite gripping poverty across the region. Many discussions have taken place in an attempt to account for these findings. However, some people feel these results tap the Latin American tendency to avoid expressions that signal a negative outlook.<sup>79</sup>



#### Power Distance

This dimension describes the attitude of a culture toward societal inequalities. It is an indicator of how people and institutions deal with inequality. It also indicates the extent to which people expect and accept social hierarchy. Scores range from a low of 35 in Costa Rica, to a high of 95 in Guatemala and Panama. Most scores fall somewhere in the 60s. This compares to a score of 40 for the United States. Higher scores for this dimension indicate that a society tends to be relatively hierarchical, with power concentrated in the hands of a few individuals or institutions. Higher scores also indicate that people are generally more aware of and tolerant of differences in social status. In addition, status symbols are important indicators of power and are highly visible. Factors such as age, sex, personal appearance, and race also influence considerations of status.



Crosswalk in Argentina
© Alex Proimos

#### Attitudes Toward Time

Many Latin Americans have a more relaxed attitude toward time and punctuality than people in the United States. 82 This is partly a result of the high value placed on social relations, which normally take precedence. Arriving on time is generally less important than maintaining relationships, chatting with family and friends, or fulfilling social obligations. 83, 84 This attitude seems to be more relevant for social appointments than for work. In some countries, such as Argentina, Colombia, Chile, and Mexico, attitudes tend to be similar to those in the United States. 85 A relaxed attitude toward time creates a tendency to be oriented toward the present moment. Latin

Americans are much more likely to enjoy the present and not worry about what the future will bring, than are many people in the United States.<sup>86, 87</sup>



## **Endnotes**

- 1 Latin America is generally understood to include all of South America, Central America, Mexico, and the Caribbean islands in which a Romance language is spoken. This vast area was settled by Spain and Portugal, but for the purposes of this document, only those nations settled by Spain and whose inhabitants speak Spanish are included in the term "Latin America." See *Encyclopædia Britannica Online*, "The History of Latin America," 2014, <a href="http://www.britannica.com/EBchecked/topic/331694/history-of-Latin-America">http://www.britannica.com/EBchecked/topic/331694/history-of-Latin-America</a>.
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# **Overview:** Chapter 1 Assessment

1. The term Latin America was coined by the French.

#### TRUE

The term Latin America was introduced by the French, who first used the term when Napoleon's nephew instigated rule in Mexico in the 1860s.

2. In the early colonial days, there was a clear segregation of the Spanish and indigenous populations.

#### **FALSE**

In the early colonial period, a significant feature of life in the Americas was the lack of segregation between the indigenous and European groups.

3. Argentina has the largest percentage of Europeans in Latin America.

#### TRUE

Several Latin American nations have large European populations. About 97% of the people in Argentina are Caucasian, mostly of Spanish or Italian ancestry. Other countries with large Caucasian European populations are Chile (89%), Uruguay (88%), and Puerto Rico (76%).

4. Latin Americans are much more likely than people in the United States to try to explain everything around them and to respect traditions.

#### **FALSE**

Both Latin American countries and the United States generally score low on the pragmatism versus normative dimension. This indicates that people feel the need to explain the world around them and are respectful of traditions.

5. Status symbols are relatively unimportant throughout Latin America.

#### **FALSE**

People are generally aware of and tolerant of differences in social status. Status symbols are important indicators of power. Factors such as age, sex, personal appearance, and race all play into considerations of status.





Unloading at docks in Mexico © Guiseppe Franchini / World Bank

# **Chapter 2: Economic Development**

# Introduction

atin America's shared colonial history played an important role in shaping the economic and political development of its nations. For most of the 19<sup>th</sup> century, Latin American economies depended on the export of raw natural products.<sup>1, 2</sup> The strategy was moderately successful, although it failed to eliminate poverty or achieve desired levels of development. Argentina, Chile, Costa Rica, Cuba, Mexico, and Uruguay are considered high development countries. All other countries are in a mid-development stage, with Guatemala ranking lowest.<sup>3, 4, 5</sup>

Since the 1980s, the economy has shifted to incorporate the realities of globalization.<sup>6</sup> Not all leaders have been equally receptive to global economic trends, however. This has led to the development of two economic models that predominate in Latin America. In the first model, the state controls the national economy. In the second, free trade and free markets operate. Generally, countries facing the Atlantic (such as Argentina, Cuba,



and Venezuela) follow the first model. Pacific-facing countries (including Mexico, Peru, Chile, and Colombia) exemplify the second.<sup>7</sup> The division is more than an interesting economic fact. It presents Latin America with a decision it must make about its future.<sup>8</sup>

Historically, state-controlled economies have fared well and have grown quickly. These prosperous times might be ending, however, as commodity prices fall and markets continue to globalize. Some economists project the countries of the Pacific Alliance Trade bloc will grow as they receive large sums of foreign investment and sustain low levels of inflation. Other projections suggest that within a decade, Mexico will become Latin American's largest economy. In contrast, the Atlantic group of nations are projected to show about half that growth in the coming years.

Whichever direction Latin America decides to go, consensus will be a key component. Providing sustainable growth is critical to stability in the region. This will improve the lives of the poor and will help develop and maintain a strong middle class. 16,17 Regional consensus and economic growth will also affect the politics of the region, by determining the amount of influence the region wields on the world stage. 18



Tequila factory, Mexico © Elizabeth Wilk

# Economic History of Latin America (1900-2014)

1900-1945

round 1900, most Latin American economies remained independent, regional, and dependent on the exchange of primary commodities. A lack of transportation infrastructure and development meant that most trade was local, rather than national or international.<sup>19</sup> The economic models that emerged during the early part of the century were based on the *laissez faire* models of Britain.<sup>20, 21</sup> Little existed in the way of factories or industry, which accounted for just

10% or less of any national economy.<sup>22</sup>

The export model was the foundation for the majority of Latin American countries, during most of the 19th century. <sup>23, 24</sup> This meant that adequate labor supplies depended on mandatory evacuations of indigenous populations and on forced labor. Inequality became more strongly ingrained into the fabric of Latin American life, even as the economy grew. Land remained concentrated in the hands of the wealthy, who were often European elites. The result was a middle-class that remained small and relatively powerless. <sup>25</sup>



At the same time, foreign direct investment increased as many foreign interests began to invest in the region.<sup>26, 27</sup> Technological innovations were imported into the region, thus fueling demand for direct exports.<sup>28</sup> Latin America became a significant partner in the world economy for the first time.<sup>29</sup> Industries began to develop in parts of the region that were transitioning from a largely export-based economy to a manufacturing dependent economy.<sup>30</sup> By the1930s, however, a populist movement began to develop. This would force Latin America to rethink its role in the world economy.<sup>31</sup> All of these developments were disrupted by the outbreak of war, especially World War II.<sup>32, 33</sup>



Cargo ship in the Panama Canal © Christine and John Fournier

#### 1945-1980

Much of Latin America had transformed by the 1940s. More people were moving to the cities, literacy rates were increasing, central banks and other financial institutions were in place, and a growing middle class was gaining power and influence. Latin American governments began to take on new roles in response to these social and economic changes.<sup>34</sup>

Latin America's economy stagnated, however, following the end of World War II.<sup>35, 36</sup>
International trade declined and the gap between the poor and the rich increased. At the same time, there was a growing sense of nationalism. Latin American leaders began to rethink their

economic policies and diminish international control over their economies.<sup>37, 38</sup> Leaders called for greater economic diversification and implemented an import substitution industrialization (ISI) model. They made this call in order to minimize the boom or bust cycles typical of export-driven economies.<sup>39, 40</sup> Land reform policies were implemented towards this end. This promoted greater production and reduced growing economic inequalities.<sup>41</sup> National governments began to develop industries and to nationalize major industries, especially oil.<sup>42</sup>

The Economic Commission for Latin America (ECLA) adopted a policy of exchange controls, trade protectionism, and enforced savings. They relied heavily on a Keynesian economic model that depends on demand. However, many of the required features of such a model were not in place. Responding to the enforced savings plan, Latin America's work force made vast investments in pension and social insurance plans. In some cases, national enrollment in such plans exceeded 50%.<sup>43</sup> The ECLA policies were clearly market-oriented, yet they also included a strong component of welfarism.<sup>44</sup>

The ISI policy did not perform as hoped. As manufacturing expanded, it merely



substituted one type of dependence for another. Rather than reducing economic inequalities as intended, the new reliance on manufacturing actually perpetuated them.<sup>45</sup> Rising nationalism combined with powerful business interests across the region to blunt attempts to regionalize the economy. Nevertheless, the state continued its role in promoting structural economic change. By the 1980s, this had given way to a preference for privatizing the economy and prompted a return to market-driven economic models.<sup>46</sup>

#### 1980-2000

The neoliberals wielded considerable influence in the 1980s. They were in favor of free trade and a reduced role of the state in managing economies. The neoliberals saw a very limited role for the state in economic policy and thus subscribed to the "trickle down" economic model. They believed that state expenditures should be matched by existing revenues, rather than borrowing or financing debt. The result was a decline in government spending and a focus on budget reform. The neo-liberals also held fast to a belief that the market should determine prices and that privatization was the key to economic growth.<sup>47</sup>

The neoliberal influence continued to grow throughout the 1990s in response to political instability across the region and hyperinflation. The collapse of communism in Europe further strengthened the neoliberal position. Many Latin American countries opened their markets and increased international trade. Significant trade agreements include NAFTA (North American Free Trade Agreement) and DR-CAFTA (Dominican Republic Central America Free Trade Agreement). Regional economic alliances formed during this period and include Mercosur, The Latin American and Caribbean Economic Association, and the Community of Latin American and Caribbean States. Many of these pan-regional movements were heavily influenced by the economic policies and practices of the United States. Approximately 2000 new alliances formed. States.

# The 21st Century

The reliance on market forces during the 1980s gave way to a pragmatic vision that sought to balance market and industrial forces. It remains unsettled, however, just how actively the state should manage the economy. Nevertheless, commodities still comprise as much as 80% of regional exports and are the region's economic backbone. China's dependency on Latin American commodities is driving much of the growth in this region, thus a slowdown in China's economy would seriously threaten Latin America. So, 57

Economic growth, while positive, has slowed. This is mainly due to increases in commodity prices, rather than increases in production. Average growth is predicted to be around 4% through 2018, even as global economic slowdowns are being felt in the region.<sup>58</sup>





Homeless in Chile © François Le Minh

Economic and political stability depends on Latin America finding ways to increase its economic growth. This is important to increasing domestic living standards and reducing widespread poverty. <sup>59</sup> This requires creating more jobs for the growing labor force. Throughout Latin America unemployment remains high, especially in Argentina, Chile, and Colombia. <sup>60</sup>

Productivity and economic competitiveness must improve and economies must diversify.<sup>61,</sup>
<sup>62</sup> Diversification will help provide greater integration into global markets.<sup>63</sup> Both of these challenges depend on increased foreign investment to create new technologies, improve

infrastructure, and create markets that are more global. Such investment has declined across most of the region over the last decade. Yet, the more liberal economies have actually witnessed an increase in foreign money.<sup>64</sup> Accomplishing these goals requires greater cooperation between the member states.

The role of socialism in Latin America must also be addressed. Although the performance of socialist economies has lagged behind, there is no doubt that these nations have made a large social impact.<sup>65</sup> For example, Cubans enjoy a high standard of living thanks to prolific spending on social programs, yet it has one of the lowest per capita incomes in the world.<sup>66, 67</sup> Venezuela's grand experiment in socialism has radically improved life for the nation's poor, but has done little to stem corruption or stabilize the economy.<sup>68, 69, 70</sup>



Emblem of the Union of South American Nations
© Oficina de Coordinación UNASUR

#### New Directions

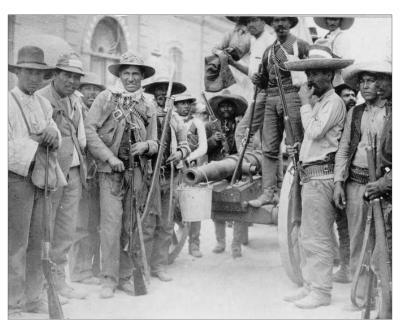
Latin America continues to flex its economic muscle and gain greater independence from the United States. New regional trade alliances have emerged, which are based on a different view of regional cooperation. For example, the Bolivarian Alliance of the Americas (ALBA) was developed to counterbalance the Free Trade Area of the Americas.<sup>71,72</sup> ALBA was founded by Cuba and Venezuela and is clearly socialist in its orientation. ALBA represents a clear departure from the neoliberal market-driven model.<sup>73,74</sup> Two other organizations, the Union of South American Nations (UNASUR) and the Community of Latin



American and Caribbean States (CELAC), are more independent options.<sup>75</sup>

The newest economic group is the Pacific Alliance, established in 2011. This Alliance represents a move away from the other organizations and towards a neoliberal economic model. Current members include Chile, Costa Rica, Peru, Mexico, and Colombia. Seven other nations hold observer status.<sup>76,77,78</sup>

There is a clear divergence of opinion on economic policy and direction among Latin American nations. The direction in which they will ultimately go is unclear. However, it is increasingly certain that the region needs to speak with a single voice if they are to meet the economic challenges confronting Latin America. There is an emerging consensus that relations between Latin America and the United states are in need of review. Rebalancing efforts are currently underway.<sup>79</sup>



Mexican rebels in the Mexican Revolution © Ruiz / Wikimedia.org

# Mexico

exico's economy has been a consistent underperformer on the world stage, despite its resources and wealth. The reasons are fundamentally due to Mexico's colonial experiences, as well as its history of revolutions and ineffective governments. 80 Like the rest of Latin America, Spain's colonial period left a legacy of severe economic inequality. Individuals born in Spain (peninsulares), as well as those of Spanish descent who were born in the Americas (criollos), owned and controlled most of the land in the country. They also ranked highest in the clearly established class system. The people of mixed European and indigenous ancestry (mestizos) were ranked in the middle, while

indigenous people occupied the lowest class in society.81

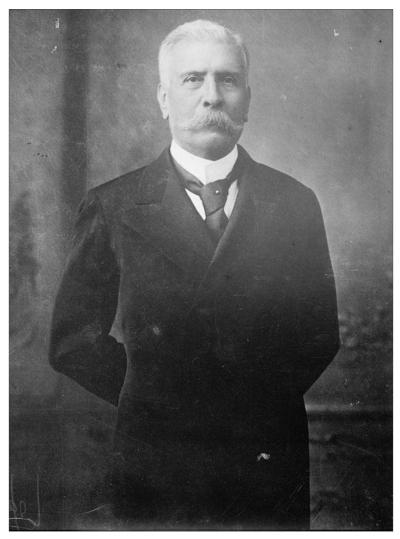
Elites have been closely aligned with the government since the colonial era and the Mexican Revolution tried to address this and other inequalities. However, it simply replaced the old system with a patronage system of cronyism, which was as firmly entrenched as the colonial system. Even when the government owned and controlled the industries, they were managed largely for the elite. Capitalism merely fueled corruption and favoritism. It did little to redraw the lines of power.<sup>82</sup>

What emerged was a fundamentally unstable economic system, with wealth concentrated in the hands of a few. Mexico ranked 61 out of the 187 countries included on the 2013 Human Development Index.<sup>83</sup> Approximately 52% of Mexicans fell below



the poverty line in 2012.<sup>84</sup> Little progress has been made in equalizing incomes in recent years. The standard of living for the middle and lower classes has actually declined since 1991.<sup>85,86</sup> According to a new study, only 39% of the country belongs to the middle class, where incomes top out at about USD 9,090.<sup>87,88</sup>

Growth continues to be stagnant, even though the economy has recovered from the worst of the 2008-2009 global crises.<sup>89</sup> The economy continues to suffer from corruption and labor market rigidity. Promised reforms have been slow to materialize and Mexico has been left with the worst of the free market and state-run economic systems.<sup>90, 91</sup>



Porfirio Diaz © Ruiz / Wikimedia.org

#### 1900-1945

Most of Mexico's trade was based on the export of raw materials and commodities during the colonial era. Yet by 1900, 90% of all Mexican industry and a quarter of the land were controlled by foreign interests. Between 1900 and 1920, Mexico's economic growth was unstable. Foreign interests, especially oil companies, were prospering, even as the rest of the nation continued to suffer under the devastation of the revolution. S

Porfirio Díaz ruled by dictatorship from 1876-1911. He quickly established a patronage system that rewarded those who supported him, while brutally repressing the opposition. He surrounded himself with intellectuals who believed that Mexico's social progress depended on rational planning and economic development. Opposition toward Díaz grew and he was overthrown in 1911. Between 1911 and 1929 Mexico suffered two counter-revolutions, three civil wars, five coups, and a presidential assassination. This instability contributed to a decline in the economy. Mexico would not see economic success until the oil boom of the 1970s. 95, 96

In the late 1920s, Mexico's government, headed by the PRI (Institutional Revolutionary Party) seized private lands and nationalized some industries, most notably oil. The PRI launched a broad program to industrialize the nation and develop manufacturing.<sup>97</sup>

Mexico implemented a series of protectionist trade policies in the following years and



began limited land redistribution among the peasants. Migration to the cities increased as people sought work in the new factories. The PRI, like many governments before it, practiced a strong system of patronage. It colluded with business owners and elites, nationalized its oil industry, and crushed attempts at collective bargaining. Large government subsidies effectively crippled the free market competition and industry became increasingly unproductive and inefficient. 98, 99, 100 Mexico's economy fell into a state of decline by the 1940s and it was strained even further by the outbreak of World War II. 101, 102, 103



Cotton plant © Aileen's Pics / flickr.com

#### World War II

World War II transformed the Mexican economy. Mexico was unable to import the goods it needed during the war. This resulted in increased demand for local material and labor. Additionally, most of the world withdrew from international economic markets. These factors combined to prompt Mexico into expanding its industries and boost production. New industries emerged, including a textile industry that accounted for nearly a third of the nation's exports by the end of the war. The huge profits generated by manufacturing were reinvested into other parts of the economy. 104, 105

Mexico built and expanded factories to produce goods to meet domestic demand. Import substitution became an important part of the

wartime economy.<sup>106, 107</sup> Mexico also found it could meet a need for non-traditional products, such as raw cotton and winter vegetables. In addition, hundreds of thousands of temporary laborers went to the United States to fill the void left by workers who were called up for the military draft. This program continued in effect until the 1960s. It ultimately involved millions of Mexican workers.<sup>108, 109</sup>

By war's end, Mexico's economic infrastructure had changed. A new class of entrepreneurs was willing and able to invest in urban businesses. A middle class began to emerge with money to spend. The socialist programs of the 1930s were abandoned, along with economic policies focused on agrarian reform. Mexico proceeded into industrialization by adopting the import substitution model for economic expansion. Mexico expanded important manufacturing subsectors such as tin, steel, textile, cement, and fertilizers. <sup>110</sup>

This growth was mostly financed by Mexico itself, fueling other important changes. The banking system was revised and the Central Bank received broader powers over fiscal



policy. The nation's money supply more than doubled and banks began providing loans to businesses.<sup>111</sup>



Neighborhood in Mexico © Global Tribe / flickr.com

#### 1945-1980

The economic expansion of the war years proved unsustainable. However, this stage of development had a lasting effect on the Mexican economy. Significant structural changes that began in 1940 still provide the foundation for most economic policy and development. Manufacturing now plays a larger role in exports than ever before. Investment in the public sector moved away from agriculture and transportation infrastructure. Income became even more concentrated. Today, 61% of the population of rural Mexico lives in poverty. The root cause of most of the poverty is structural. This is a legacy of the economic shift begun in 1940. 114, 115

Mexico's economy grew at the second-highest pace on record between 1950 and 1973.<sup>116</sup> Actual per worker GDP rates increased during this period. Inflation was low, budget deficits were moderate, and investment in infrastructure increased. Per worker GDP continued to grow between 1971 and 1982. However, inflation increased along with budget deficits.<sup>117, 118</sup>

After 1973, economic growth slowed to somewhere between a third and a half that of the previous two decades. The government began to accumulate large deficits, both domestic and international. Inflation soared to nearly 19%. This prompted more government intervention, including the purchase of more businesses. This further increased government debt. In addition, the discovery of more oil reserves spurred government investment in the oil industry. Some of the revenues were invested in public infrastructure, especially education. 120

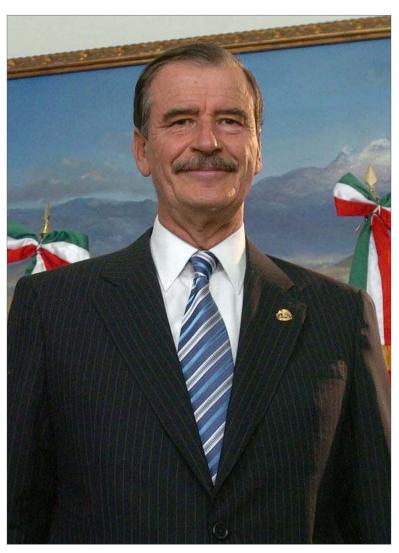
### 1980-2000

Economic growth ground to a halt between 1982 and 1995 and Mexico's economy was in serious trouble. The government tried to curb inflation and restore stability by launching a new fiscal policy. This policy included reduced expenditures, increased taxes, and the privatization of some state-owned businesses. Some control had been established by 1991, yet the recovery was unsustainable. Growth again slowed by 1992. Two years later, in 1994, Mexico ran out of foreign currency reserves. This caused the value of its currency to drop more than 6% in 1995.

There were numerous causes for the peso meltdown, but an important feature was



political instability. Peasants in the southern state of Chiapas staged a revolt the previous year and the PRI's leading presidential candidate and its secretary-general were assassinated.<sup>124, 125</sup> The government's response to the crisis was quick and included the introduction of severe austerity measures. The banking sector was overhauled, which included allowing foreign interests to purchase Mexican banks. The United States provided financing to allow Mexico to maintain its international market access.<sup>126</sup>



Vincente Fox © Ruiz / Wikimedia.org

## *The 21st Century*

In 2000, the PRI lost national elections for the first time since the revolution and the National Action Party (PAN) candidate, Vicente Fox, was elected president. Fox's administration focused its efforts on bankruptcy reform. Nevertheless, Mexico was devastated by the global financial crisis of 2007-2009. The economy began to recover in 2010, yet it still has not reached pre-crisis levels. 128

Mexico scores 66.8/100 on the overall economic freedom ranking as a moderately free nation for conducting business. <sup>129</sup> Numerous barriers continue to stall Mexico's economic growth. Among the main problems are monopolies in telecommunications, transportation, oil, and electricity. Drug trafficking and violence have also seriously effected growth. <sup>130, 131, 132, 133</sup> Corruption continues to stall progress and limit development. <sup>134, 135</sup>





Agriculture in Honduras © Media Tour to Honduras / flickr.com

# Central America

## *Pre- 20th Century Economies*

Samong the Central American nations.

Panama and Costa Rica score highest on the human development scale and rank as high development countries. Medium development countries include El Salvador, Honduras, Nicaragua, and Guatemala. Like elsewhere in Latin America, elements of the colonial legacy are still apparent in economic development.

Central America had few of the precious metals Spain valued, thus agriculture became the

mainstay of its colonial economy. Cacao was the first significant export commodity, but was replaced by indigo. A few wealthy individuals owned large haciendas, yet most Central Americans were subsistence farmers.<sup>137</sup>

The Bourbons occupied the Spanish throne from 1701-1808 and emphasized agricultural exports. The Spanish throne set policies in place that remain the foundation of the current economies. The Liberals came to power in Central America in the last part of the 19th century and continued to focus on agricultural exports. Coffee became the most significant product. The expansion of the banana industry led to the construction of important transportation infrastructure. With the exception of Costa Rica, the agricultural aristocracy relied heavily on the governing military elites. The military elite helped the aristocracy maintain control of their economic interests. 139

#### 1945-Present

The end of the 20th century was a turbulent time for the Central American republics. Demands were made for greater equality and improvements in living conditions. These demands led to direct and persistent battles between Marxist and free-market economic models. Frequent civil war and political conflict severely compromised economic growth. The Marxists prevailed in Nicaragua. The rest of Central America followed the path of democratic and free-market institutions. 140, 141

Central America's economy has strengthened in the last two decades. The countries have established greater regional integration, expanded international trade opportunities, implemented fiscal austerity, and reduced state intervention in the economy. They have also expanded the private sector. The economies remain dependent on export revenues. The main exports are no longer agricultural products. Manufactured goods are now the primary exports. Half of all exports are bound for the United States, which is Central America's largest trading partner.



Central America faces several challenges to economic growth and development. These include escalating drug violence, money laundering, and weak fiscal policies. <sup>145, 146, 147, 148, 149</sup> International investment is increasing, yet the inflow of money depends on international money supplies and the health of the global economy. <sup>150</sup> High poverty rates also limit growth potential. Although regional poverty has declined, Central America, along with Mexico, has the highest poverty rates in Latin America. The lowest rates are in Costa Rica and Panama. <sup>151, 152</sup> Between 43% and 60% of people in the rest of the region fall below the poverty line. <sup>153, 154, 155, 156, 157</sup>

The global financial crisis of 2007-2008 prompted a review of current economic policies. An important outcome is a greater willingness to accept state intervention in economic affairs. In the coming years, the state is likely to intervene more directly in economic affairs, especially providing subsidies to major economic sectors. <sup>158</sup> Central America's collective economies will have to face challenges related to improving infrastructure and dealing with demographic changes. However, specific strategies are likely to vary by nation. Each will have to find ways to expand technology and diversity their export base. Trade relations beyond the United States need to be developed and strengthened. <sup>159</sup>

The short-term outlook for Central America predicts growth will be about 3.2% in 2014. Most of that growth will be driven my rising tourism and export revenues, along with growth in the construction sector. Remittances from abroad will also be a significant factor. However, prospects could be hampered by high rates of public debt, combined with high budget deficits. <sup>160</sup>



Drying tobacco leaves © Francois D / flickr.com

# Cuba and the Caribbean

Spanish Colonial Economy

he Caribbean region was the first settled by the Spanish. Colonial Spain was mainly interested in the mineral wealth it could gain from its new colonies. The Caribbean had few such resources and became a staging area for Spanish ships bound for the mainland colonies. Many of the islands became little more than military bases for the Spanish. Thus, island economies were based largely on military and transport activities. 161, 162 Spain went on to establish its system of *encomienda* during the 18th century. Under this system,

indigenous people worked the land for the Spanish landowners in return for protection. However, the indigenous population was quickly decimated and African slaves were brought in to work the plantations. Sugar, tobacco, and leather products



quickly became the primary exports in the 18th and 19th centuries. 163, 164

Cuba's sugar industry quickly expanded, but caused serious financial and social strains. These frictions were the basis for the first war of independence (1868-1878). Spain eventually prevailed and promised to implement economic and social reforms. Spain did not deliver on the promised reforms. Instead, it cancelled trade relations with the United States and increased taxes. By 1895, Cuban resistance to Spanish rule was quickly growing. A second civil war erupted in which the both sides appeared intent on destroying the island's sugar plantations. <sup>165, 166</sup> The United States declared war on Spain in 1898, after the USS Maine sank in Havana Harbor. Spain was quickly defeated and ceded Cuba to the United States at the Treaty of Paris in 1898. <sup>167</sup>

#### 1900-1959

The Cuban economy continued to develop as a single export agricultural nation that was heavily reliant on slave labor. At the turn of the century, nearly 80% of Cuba's export revenues came from its sugar industry. By the 1950s, the Cuban economy had grown into one of the strongest in Latin America and was mostly controlled by foreign interests. Three-quarters of arable land, 40% of sugar production, and 90% of essential services were owned by foreign companies. 170, 171

Nevertheless, power and wealth remained concentrated in the hands of few. As economic inequality increased, Cubans became increasingly dissatisfied with their government. This paved the way for another revolution led by Fidel Castro. Castro's victory, along with subsequent international events, had profound consequences for the way Cuba's economy developed over the next 50 years.<sup>172</sup>

#### 1959-Present

Fidel Castro and a band of men successfully overthrew the Cuban government in 1959. They assumed power and formed a new government that quickly established strong ties with the nation's poor and its idealist intellectuals. The Communist Party of Cuba took a leading political role in the new republic. Cuba's socialist republic was modeled on the Soviet-bloc and became the first socialist republic in the Americas. Existing capitalist structures were dismantled and the state assumed a central role in planning the economy. Agricultural lands were collectivized, foreign property holdings were nationalized, and relations with the Soviet Union were strengthened. 173, 174

These moves angered and frustrated the United States, resulting in efforts to undermine the Cuban government. The United States implemented a full trade embargo on Cuba. This action forced Castro to turn to the Soviet Union for much needed capital, military, and financial assistance. <sup>175, 176, 177</sup> Meanwhile, attempts to diversify the economy failed and the Cuban economy remained dependent on the sugar cane industry. <sup>178, 179</sup>

By the mid-1990s, Cuba had legalized some small business ventures, such as family restaurants. It also approved a marginal amount of private sector employment and



allowed remittances from the United States. Small independent farms began to emerge and farmer's markets were actively encouraged. 180

Cuba's economy still depends largely on exports, but it no longer depends on sugar. Instead, its main exports include petroleum, nickel, and medical products. 181, 182, 183 Services are actually the largest Cuban export, led by doctors who have been sent to Venezuela in an oil-for-doctors exchange agreement. 184, 185

Cuba's economy today remains largely centrally planned and state driven. Some of the restrictions on private ownership are being lifted and tens of thousands of state jobs have been eliminated. <sup>186, 187, 188</sup> Current estimates suggest that as many as one in five Cuban workers are employed in the private sector. That number is expected to be about one in three by 2015. <sup>189, 190</sup> Nevertheless, the main economic institutions remain largely under government control. <sup>191, 192, 193</sup> Nearly all national GDP (95%) was generated by the state in 2012. The government hopes to shift up to 45% of GDP to the private sector by 2017. <sup>194</sup>



Shipping port in Colombia
© Ted McGrath

# South America

1900-2000

South America's economic history is like much of the rest of Latin America. It has been one of boom and bust. This cycle was the result of the continent's heavy dependence on commodity exports as their primary revenue base. 195 Economic growth in the early 1900s relied primarily on investment capital from Europe. It also relied on improving agricultural technology to increase output. 196 This stimulated the growth of South American industry, especially in the areas of food processing and textile production. Mining and

construction were also growth industries. 197

Between the 1930s and 1980s, most of South America relied on the import substitution industrialization model. This was done to minimize the "boom or bust" cycles typical of export-driven economies. Many governments implemented protective trade and tariff regulations to buffer their economies against competition. Revenues were often reinvested into social programs and the military. South American countries also borrowed heavily from international financial agencies, such as the World Bank and the Inter-American Development Bank, to build infrastructure and manufacturing. However, most countries were unable to repay those debts and the region's economy severely contracted between 1980 and 1990. As a result, many countries experienced



inflation rates that soared 3,000%. This led to reductions in both expenditures and investment.<sup>200</sup> Economic growth continued to slow through the 1990s and per capita income, in many countries, was near or below zero.<sup>201</sup> Only Colombia and Chile did not suffer declines in GDP.<sup>202, 203</sup>



Rice farm in Uruguay © Niel Palmer / CIAT

### 21st Century

Most of South America has been forced to restructure their economies and adopt a neo-liberal free-market system. State-owned businesses have been sold to the private sector and social programs have been rolled back.<sup>204, 205</sup> Economies began to recover by 2000 and economic performance has been solid since 2003. South America's economic recovery was stronger than the rest of Latin America. Average GDP grew almost 5% for the five years between 2003 and 2008.<sup>206</sup> Increasing economic independence, combined with growing nationalism, prompted many countries to adopt left-leaning economic policies that favor existing neo-liberal ideas. These

countries included Argentina, Bolivia, Chile, Colombia, Ecuador and Venezuela. 207, 208

Most of South America's economy is once again dependent on commodity exports to generate state revenues. Many countries rely on mineral extraction and hydrocarbons as their main exports. <sup>209, 210, 211, 212, 213, 214</sup> Two notable exceptions include Paraguay and Uruguay. Paraguay's economy is heavily reliant on its informal economy, particularly in the rural areas. Agriculture also plays a major role in the creation of national GDP. <sup>215</sup> Uruguay's market-oriented economy depends largely on its agricultural sector. <sup>216</sup>

The largest economies on the continent include Argentina, Colombia, and Chile.<sup>217</sup> Uruguay, despite its small size, is also one of the strongest in the region. If economic trends continue, Uruguay could have one of the region's largest and strongest economies.<sup>218, 219</sup>

The Pacific Alliance is a dynamic economic force in the region. It includes Mexico, Colombia, Chile, Costa Rica, and Peru. The Alliance is now the ninth largest economy in the world. Paraguay Mercosur is also an economic alliance, consisting of Argentina, Brazil, Paraguay, Uruguay and Venezuela. It is the world's fifth-largest economy. Five other countries, Chile, Bolivia, Colombia, Ecuador, and Peru, are associate members, but lack full access to the bloc's markets.





Copper mining in Chile
© Robin Nystrom

# **Economic Outlook**

he outlook for the economies of South America is mixed. Economic growth will be around 4% for South America's largest economies. Growth is likely to be significantly smaller in the other nations that are heavily dependent on export commodities.<sup>223</sup> Inflation is rising throughout the region, except for Ecuador. Estimates suggest that inflation will be around 10% for the region in 2014 and hover around 8.5% in 2015.<sup>224</sup>

Argentina has made use of protectionist trade policies, which have been somewhat successful. However, foreign investors are wary because of Argentina's recent nationalization of a Spanish

company.225

Peru has large reserves of natural resources, yet the nation has not been able to expand its economy beyond mining and timber.<sup>226</sup>

Chile has relatively limited resources and has thus focused on accumulating substantial surpluses and significant foreign reserves. Chile remains largely dependent on copper revenues and if copper prices drop, its economy could suffer. The government has been trying to diversify the economy by developing its other sectors, including agriculture and technology. However, the relatively high standard of living and its high wages make Chile's market less competitive than other countries.<sup>227</sup>



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# **Overview:** Chapter 2 Assessment

1. Many of the historical elements of Latin America's colonial past still influence the region's economy.

#### **TRUE**

Latin America's shared colonial history has played an important role in shaping the economic and political development of its nations.

2. In the last two decades, most of Central America has developed a left-leaning economic structure.

#### **FALSE**

At the end of the 20th century, demands for greater equality and improvements in living conditions led to direct battles between Marxist and free-market economic models. The Marxists prevailed in Nicaragua but the rest of Central America adopted more free-market institutions.

3. For most of the 19th century, Latin American economies were based on the export model.

## **TRUE**

Latin American economies depended on the export of raw natural products for most of the 19th century.

4. Latin America's largest economies in South America are Argentina, Colombia, and Venezuela.

#### **FALSE**

The largest economies on the continent include Argentina, Colombia, and Chile.

5. The Pacific Alliance represents a move toward more socialist policies.

## **FALSE**

The Pacific Alliance represents a move away from the other organizations and towards a neoliberal economic model.





El Castillo, Mayan pyramid © Daniel Schwen

# **Chapter 3: Society**

# Introduction

atin Americans share a common language, culture, and history. Yet, there is wide variation in their national cultures and societies. Three civilizations dominated the region when the Spanish first arrived on the mainland: The Aztecs, the Mayans and the Incas.<sup>1,2</sup> The Spanish first conquered the Aztecs (1521) and Mayans (1524) of Mexico. They later moved on to conquer the Incas in Peru (1532).<sup>3,4,5</sup> Thousands of Spanish immigrants flowed into the new colonies, once these pre-Colombian societies were defeated. The Spanish rapidly set up a feudal system in which the elite owned and controlled most of the land and enslaved the local people.<sup>6</sup>

The Spanish mixed with the indigenous and African people in the region, thus creating a new cultural mix. The children of Spanish and indigenous parents were called *mestizos*, while the term "mulatto" refers to those of mixed African-European ancestry.<sup>7</sup> These new categorizations created numerous social tensions that still persist.<sup>9</sup>

Gender became an important issue in colonial life. There were few Spanish women early in the colonial period. Most women in the early colonies either were related to the men or had arrived from elsewhere specifically to marry a Spaniard. They actively



participated in economic arenas, owning both land and businesses. Their numbers steadily increased and, within a few decades, the numbers of men and women were roughly equal. Regardless, women remained largely in traditional roles. Today, Latin America has closed 69% of its gender gap, yet it still falls behind Europe and North America. America.



Catholic church in Mexico
© Julius Reque

# Religion in Latin America

# Catholicism in Latin America

atin America is home to 40% of the world's Catholics. Mexico has the second-largest Catholic population in the world. 12, 13, 14 While no Latin American country has an official state religion, Catholicism is the de facto national religion for most. 15 Uruguay (47%) and Guatemala (59%) have the least number of Catholics. The countries with the largest number of Catholics are Honduras (97%), Venezuela (96%), Bolivia (95%), Ecuador (95%), Dominican Republic (95%), Argentina (92%), Colombia (90%), and Paraguay (90%). 16

Devotion to faith varies throughout Latin America. Nearly 40% of people in Uruguay say they have no religious affiliation.<sup>17</sup> In Venezuela, formal religion does not play a central role in daily life. Few Venezuelans attend church regularly, turning to the church mostly in times of trouble.<sup>18, 19, 20, 21</sup> Only about 20% of Argentinian Catholics could be considered practicing Catholics.<sup>22</sup> In Mexico, church membership is waning. Most Mexicans attend church for family events like weddings, funerals, and baptisms but rarely attend mass.<sup>23</sup> On the other hand, Colombians attend church much more regularly and are generally among Latin America's most religiously devoted groups.<sup>24, 25</sup>

# History of the Catholic Church in Latin America

The Catholic Church in Latin America has long played a significant role in social and political development. The first missionaries arrived in the Americas shortly after the fall of the Aztecs early in the 16th century. The priests quickly built towns, villages, and churches for their new converts. Hundreds of thousands of South Americans lived in the autonomous colonies run by the Jesuits, complete with independent Jesuit armies.<sup>26</sup>, The Catholic Church and the Jesuits had grown so strong by the middle of the 18th century that some government officials called for their expulsion from Latin America.<sup>28</sup>

The church rivaled secular governments during the colonial era. Power and tensions between the two were often apparent.<sup>29</sup> The Church regarded converting the indigenous



population to Catholicism as its mission, while secular governments were interested in extracting wealth. To accomplish this, governments enslaved most of the native population and forced them to work on plantations and in mines. The Catholic Church outlawed the slavery of Indians in 1537; however, not all Spanish governors embraced this change. Furthermore, the Church continued to allow African slaves to be imported to replace the indigenous laborers.<sup>30</sup> By the time most colonies had achieved their independence from Spain, the Church owned nearly 50% of all the wealth.<sup>31, 32</sup>

The role of the Church was a central issue in the disagreements between the Liberal and Conservative factions that dominated Latin American politics. Conservatives sought to protect religious privilege, but Liberals wanted a clearer separation of church and state. Even in the 1960s and 1970s, church officials were criticized for being complicit in the repression carried out by conservative dictatorships.<sup>33</sup> The clergy is not monolithic, however, and many priests have been actively involved in revolutionary or dissident movements. In Mexico, for example, Father Miguel Hidalgo y Costilla is known as the father of Mexico's independence.<sup>34</sup> José María Morelos assumed leadership of Mexico's revolutionary movement, after father Hidalgo was executed.<sup>35</sup> The Colombian priest, Camilo Torres, helped found the National Liberation Army (ELN) guerilla group.<sup>36</sup>



Students in Argentina © Nahuel Berger / World Bank

# Race and Ethnicity in Latin America

Partial Propulation and ethnic mixing occurred in Latin America during the colonial era. This caused numerous issues to arise as each country tried to develop a national identity. Elites were eager to present a united image of their new republics to the rest of the world, yet the reality of an ethnically mixed population perplexed many. Early in the 20th century, some regional attitudes centered on promoting the notion that, although mixed, their populations were heading toward a superior state by increasing their "whiteness."<sup>37, 38</sup> Some countries (e.g., Argentina, Chile,

Uruguay) even actively encouraged caucasian immigration from Europe.<sup>39, 40, 41</sup> Conversely, Mexico and other countries, developed philosophies of *indigenismo* and celebrated the accomplishments of their indigenous civilizations. Still other nations tried to avoid the issue completely by declaring that race and racism were not issues.<sup>42, 43</sup> By the end of the 20th century, Latin American nations were redefining their identities. They began rejecting "whiteness" as superior and officially



embraced the notion of diversity. 44, 45, 46

Discussion of ethnicity have generally replaced classifications based on "race," but this has done little to erase the reality of discrimination based on skin color. This colonial legacy continues to create important social issues throughout the region. <sup>47, 48, 49, 50, 51</sup> Generally, higher status is given to a person with lighter skin and European features. <sup>52, 53, 54</sup> The desire for and value of caucasian features continues to be important in many places in Latin America. <sup>55</sup> The indigenous people are among the poorest in Latin America, while those with European heritage continue to be overrepresented in elite positions. <sup>56, 57, 58</sup>



Evo Morales
© Yves Picq

# Indigenous Peoples

Millions of indigenous people lived in modern-day Latin America when the Spanish arrived. Approximately 60% belonged to the Aztec, Mayan, or Incan empires.<sup>59</sup> Some indigenous groups were able to sustain their culture and continued to speak their language following the conquest.<sup>60</sup> In other regions (e.g. Cuba and central Mexico), the indigenous population was virtually wiped out by violence, maltreatment, and illness.<sup>61, 62, 63</sup> Today, indigenous groups comprise about 10% of Latin America's total population and 40% of the rural population.<sup>64</sup>

The largest indigenous populations are in Bolivia, Ecuador, Guatemala, Mexico, and Peru. 65, 66, 67 In Bolivia, 62% of the people are indigenous. The two largest groups are the Quechua and Aymara. These two groups account for approximately 90% of the indigenous population. 68, 69 Bolivian president, Evo Morales, is a member of the Aymara. The Quechua and Aymara are also the largest of Peru's 51 indigenous groups. These two groups comprise approximately 45% of Peru's population. Indigenous groups in Peru are far less organized on the national level than Bolivia's indigenous population. However, there have been attempts to coordinate efforts and address the concerns of these groups. 71, 72

In Ecuador, approximately 14% of the population is indigenous. Ecuador's indigenous groups have been active in promoting their political



interests, demanding restitution for land seized from them, and fighting to protect natural resources. The Confederation of the Indigenous Nations of Ecuador (CONAIE) is an important political actor and has organized various pan-indigenous uprisings throughout Ecuador.<sup>73, 74</sup>

In Guatemala, more than 60% of the population is indigenous. Most (73%) live in poverty.<sup>75</sup> Guatemala's indigenous groups are under threat from land seizures and from large-scale mining operations on their lands.<sup>76</sup> Protests against the government have led to violence and the death of some protestors.<sup>77</sup>

Mexico's indigenous population is concentrated in the southern and the Yucatan regions. They comprise approximately 15% of the population.<sup>78,79</sup> The states with the largest indigenous populations include Oaxaca, Chiapas, Veracruz, Puebla, and Yucatán.<sup>80,81</sup> Indigenous groups have long been politically active.<sup>82</sup> The Zapatista rebellion is one of the most well-known indigenous movements. It began in the state of Chiapas in 1994 and continues today.<sup>83,84</sup>



Ronaldo, Mestizo from Brasil © Antonio Cruz

# Mestizos

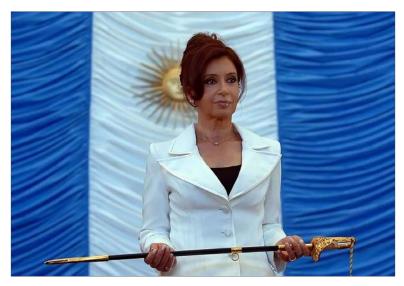
The term *mestizo* in Latin America refers to a person of combined European and indigenous ancestry. The term also has social and cultural connotations.<sup>85</sup> Mestizos are the largest group in Latin America. They comprise half the population in all Central American countries, except Costa Rica.<sup>86,87</sup> The countries with the largest percentages of *mestizos* include Paraguay (95%), Honduras (90%), and El Salvador (86%).<sup>88</sup> Argentina, Chile, and Uruguay have the smallest populations of mestizos.<sup>89</sup>

Mestizos suffered exploitation and discrimination at the hands of the Spanish, throughout colonial history. Although they were higher on the social ladder than indigenous groups, mestizos were still prevented from holding public office. They were also banned from many of the more important and prestigious jobs. <sup>90, 91</sup>

The process of mixing races and cultures is known as *mestizaje*. <sup>92</sup> The process allowed the Spanish to maintain their social and economic superiority by substituting one classification scheme for another, thus complicating social issues related to race and ethnicity. <sup>93, 94</sup> Blacks, mulattos, and indigenous



people are more likely to live in poverty, have lower levels of educational achievement, be illiterate, be in poorer health, and face other sorts of discrimination, especially in the workplace. 95, 96, 97, 98



Christina Fernandez, President of Argentina © Presidencia de la N. Argentina

# Gender and Gender Roles

n enduring feature of Latin culture is the phenomenon known as machismo. This is defined as an exaggerated sense of male bravado. In practice, it means that men are considered dominant and are the unquestioned authority within the household. In this context, women are viewed as weaker and submissive to men. Often, there are also dual sets of standards for sexuality and sexual behavior. 99, 100, 101 In many countries, machismo continues to create challenges for women and society. 102, 103, 104

Latin America has made progress, however, in creating greater parity between men and

women.<sup>105</sup> The presidents of Argentina, Chile, and Costa Rica are all women.<sup>106</sup> About 25% of all legislators are women, second only to Scandinavia.<sup>107</sup> Yet, there are wide variations in progress across Latin American countries. Nicaragua ranked 9/135 and has achieved greater gender equity than the United States (77% vs. 73%). Three other countries are in the top 30 nations in the world, with respect to gender parity: Cuba (19), Costa Rica (29) and Bolivia (30).<sup>108</sup> On the other end of the spectrum, Guatemala has achieved the least equity (63%) and ranked 116 out of the 135 countries studied.<sup>109</sup>

Nearly 70% of Latin American women have been victims of domestic abuse and 47% report they have been victims of sexual violence. The rate of femicide is also high, which is the practice of killing a woman simply because she is a woman. El Salvador ranked #1 in the world in femicide and Guatemala ranked third. Women continue to earn less than their male counterparts do, even when women attain higher levels of education. Fewer women participate in the labor force and the rates of female unemployment in 2012 were 50% higher in Latin America and the Caribbean.

# Social and Human Development

ocial development refers to general living standards, development of group relations, and broader cultural development. It is a description of the lives of people and the quality of their existence. It can provide insights into general attitudes, interpersonal dynamics, values, and the social stratification within given



societies. The Human Development Index (HDI) is a useful measure and includes data about life expectancy, educational attainment, and income. This measure provides a picture of overall development.<sup>114</sup>

Countries throughout Latin America vary in their level of development. Three countries—Chile, Argentina, and Uruguay—are very high development countries and similar to the United States. Of the other nations, nine are high development countries and eight are medium development countries. The least developed nation is Guatemala, which ranks slightly above India. The table below provides more details.<sup>115</sup>

Human Development Rating in 21013

| Country            | RANK | Development    |
|--------------------|------|----------------|
| ,                  |      | Classification |
| United States      | 3    | Very High      |
| Chile              | 40   | Very High      |
| Argentina          | 45   | Very High      |
| Uruguay            | 51   | High           |
| Cuba               | 59   | High           |
| Panama             | 59   | High           |
| Mexico             | 61   | High           |
| Costa Rica         | 62   | High           |
| Venezuela          | 71   | High           |
| Peru               | 77   | High           |
| Ecuador            | 89   | High           |
| Colombia           | 91   | High           |
| Dominican Republic | 96   | Medium         |
| El Salvador        | 107  | Medium         |
| Bolivia            | 108  | Medium         |
| Paraguay           | 111  | Medium         |
| Honduras           | 120  | Medium         |
| Nicaragua          | 129  | Medium         |
| Guatemala          | 133  | Medium         |
| India              | 136  | Medium         |

Latin America was largely rural until roughly 75 years ago. Sewage, sanitation and education services were undeveloped or completely absent. Thus, life expectancy was low, mortality rates were high, and literacy rates were low. A transition began at the end of World War II, when people began moving to cities. People began to live longer and education expanded to an increasing number of people. Consequently, economies began to grow and diversify, and a middle class emerged.<sup>116</sup>





Poverty in Mexico
© Kashfi Halford

# Poverty and Development

Poverty is lessening, yet it remains a concern, especially among indigenous groups. Central America is the poorest region in Latin America.<sup>117</sup> The highest levels of poverty are in Honduras (60%), Guatemala (54%), and Nicaragua (46%).<sup>118</sup> Mexico fares only somewhat better. In 2013, 45% of Mexicans lived below the poverty line. That figure soared to nearly 80% among indigenous groups.<sup>119, 120, 121</sup> In South America, only Bolivia had a poverty rate above 50%. The other countries range between 27% and 37%.<sup>122</sup>

Extreme poverty, defined as living on less than

USD 2.50 per day, has been significantly reduced. The Southern Cone countries of Argentina, Chile, Paraguay, and Uruguay have been the most successful in eradicating extreme poverty. Bolivia, Colombia, Ecuador, and Peru, the Andean Region, have made significant but fewer gains against extreme poverty. Central America and Mexico have lagged behind, with extreme poverty rates that are about 50% higher than in South America.<sup>123</sup>

The middle class constituted about 32% of the Latin American population in 2011, but there were wide variations across nations. For example, the middle class was the largest economic class in the Southern Cone, while the middle class was the smallest economic group in the Andean Region, Mexico, and Central America.<sup>124</sup>

Access to basic services, such as safe drinking water and proper sanitation, is an important component of national development. About 10% of homes have no running water. However, those numbers vary considerably by location. For example, only 77% of the people in rural Mexico have access to safe water and 69% to proper sanitation. On the other hand, at least 90% of Central Americans have access to safe water, except in the rural areas of Nicaragua (63%), El Salvador (68%), Honduras (74%), and Panama (81%).

Even fewer people have access to proper sanitation services, with access generally lower in rural areas. Nicaragua has the least access to proper sanitation (57% urban/34% rural), followed by Honduras (78% urban/55% rural) and Panama (78% urban/55% rural). Across the rest of Central America, access to proper sanitation is between 74% and 80%, except for Costa Rica. As few as 71% of Bolivia's rural population have access to safe drinking water, while just 10% have access to proper sanitation. 128



# Crime and Violence

rime and personal security is the number one concern in Latin America due to the increase in crime and violence. <sup>129, 130, 131</sup> There are 460 victims of sexual violence on a typical day. <sup>132</sup> Robberies have also tripled and it is now the most common crime. Recent data suggest that the increase in crime has had an impact on personal feelings of security. <sup>133</sup> Fifty percent of Latin Americans say they feel that security conditions in their country are worse than before; 65% no longer go out at night because they fear it is unsafe; and, 13% have moved to increase their own safety. <sup>134</sup>

The murder rate rose by 11% between 2000 and 2010 and has now reached epidemic proportions, according to the World Health Organization. In 11 Latin American countries, there are more than are 10 murders for every 100,000 people. More than one million people have died since 2000.<sup>135</sup> Four Latin American countries ranked atop the list of countries with the highest murder rates. Honduras (1) and El Salvador (2) had the two highest homicide rates in the world in 2010, followed closely by Venezuela (5) and Guatemala (7).<sup>136, 137</sup>

The escalating crime rate is the result of a complex combination of factors. Among the most important are low wages, poverty, the breakdown of families, and inadequate criminal justice, police, and court systems. Numerous gangs operate throughout Latin America. They are a threat to personal security, they place a significant strain on public resources, and they are a hindrance to economic development and stability. 140, 141, 142

# Gangs

Gangs are not the only cause of the escalation in violence, yet they have become increasingly active and violent. Drug gangs in South America are allegedly giving millions of dollars to al-Qaeda militants, to provide the safe passage of drugs routed through north Africa on their way to Europe. 143, 144 Other criminal groups (e.g., United Self-Defense Forces of Colombia) have attempted to infiltrate high levels of government. 145

Central America is now the most violent region in the world, according to some studies. After Gangs are responsible for a wide variety of criminal activity, including kidnapping, human trafficking, drug smuggling, extortion, and threats to public transportation systems. Gangs are also responsible for the assassination of more than 550 bus drivers in Guatemala. Approximately 54,000 gangs operate in Guatemala, El Salvador, and Honduras and many have ties to gangs in the United States, including the notorious MS-13 (Mara Salvatrucha) and M-18 (the 18th Street Gang).

Gangs and drug cartels in Mexico have been the source of much violence during the last decade. <sup>151, 152, 153</sup> Several major cartels operate in Mexico, each controlling different



regions of the country.<sup>154</sup> One of the most powerful is the Zetas. They control at least 11 states, mostly along the Gulf Coast and the northeast.<sup>155, 156</sup> The Zetas have known connections with criminal groups in the United States and has forged an alliance with MS-13 in Central America.<sup>157, 158, 159</sup> Other major gangs include the Knights Templar (mostly in Michoacán state); the Sinaloa Cartel (17 states in Mexico, including the city of Juarez); the Gulf Cartel (in northern and eastern Mexico); Beltran-Leyva (in Sinaloa and along the Pacific Coast); Tijuana Cartel (in and around Baja California and the city of Tijuana).<sup>160</sup>



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# Overview: Chapter 3 Assessment

1. Catholicism is the official religion of some Latin American nations.

#### **FALSE**

No Latin America country has an official state religion. However, Catholicism is the de facto national religion for most.

2. The Catholic Church often rivaled governments for power during the colonial period.

#### **TRUE**

The church rivaled secular governments during the colonial era. Power and tensions between the two were often apparent. By the time most colonies had gained their independence, the Church owned nearly 50% of all wealth.

3. The term mestizo refers to all people of mixed ethnic heritage in Latin America.

#### **FALSE**

The children of Spanish and indigenous parents were called mestizos, while the term mulatto refers to those of mixed African-European ancestry.

4. Indigenous groups constitute approximately 10% of the population in Latin America.

#### **TRUE**

Today, indigenous groups comprise about 10% of Latin America's total population and 40% of the rural population.

5. Gangs have helped make Central America one of the world's most violent regions.

## **TRUE**

Central America is now the most violent region in the world, according to some studies. Approximately 54,000 gangs operate in Guatemala, El Salvador, and Honduras and many have ties to gangs in the United States.





Hugo Chavez
© Victor Soares

## **Chapter 4: Political Development**

## Introduction

atin America's political development is notably different from the United States. This is due, in part, to their different colonial hisories. Latin American colonies were founded during a time when feudal systems dominated Europe.<sup>1, 2</sup> Thus, religious orthodoxy and autocracy typified colonial life. By the time the U.S. colonies were founded, feudalism had ended and Europe was experimenting with limited representative governance.<sup>3, 4</sup> Religious orthodoxy had been replaced by religious pluralism after the Reformation and the Industrial Revolution was underway.<sup>5, 6</sup> However, Latin America continued to be saddled with the feudal traditions of autocratic rule. the Church's domination over society also made it difficult to develop the necessary infrastructure for the creation of democratic states.<sup>7</sup>



Although each Latin American nation is different, they share a common language, history, and colonial experience. Debates continue regarding the direction each should take as they move toward the future. These discussions have sometimes been fruitful. At other time, they have been sufficiently contentious to delay national development.<sup>8</sup> Democracy was on the rise at the beginning of the 21st century, though in a form that was different from the United States and Europe. Democracy began to retreat by 2010, however, as more authoritarian governments took power.<sup>9, 10, 11</sup>

By 2014, most of the conservative governments had been replaced with administrations that are more leftist. The first country to take a left turn was Venezuela under Hugo Chávez. Venezuela was soon followed by Bolivia (Evo Morales) and Ecuador (Rafael Correa). Attempts to consolidate power occurred in Honduras, but were thwarted by the military and the courts. The 2006 election outcomes in Chile, Colombia, and Peru, also favored left-leaning presidents. Most of the leftist governments are pragmatic and focused on improving living conditions for the poor. Significant policy differences have emerged among the nations. While no monolithic socialist bloc exists, the region has moved away from the values and fundamentals of conservative philosophy. The new debate in Latin America is no longer between the politics of the traditional left versus right. It is a new pragmatism that has more to do with the social distribution of opportunities, wealth and trade, than with conventional politics. At the social distribution of opportunities, wealth and trade, than with conventional politics.

## The Development of Political Systems in Latin America

## The Colonial Legacy

hortly after the Spanish conquered Latin America, they established feudal estates under the control of the Spanish elite. They also implemented a political system similar to that of medieval Spain. The viceroy held absolute power under the absent Spanish king. The captain-general was next in line and held authority within a specified territory. Next in line were the landowners (hacendados) who ruled with absolute power over their feudal lands and the indigenous people. There quickly emerged a two tiered class system. The Europeans were at the top and the indigenous people and African slaves were on the bottom.<sup>24</sup>

The Catholic Church also played an important role in the settlement and development of Latin America. It served as an arm of the Spanish government and reinforced the power of the king. The Church was charged with converting the indigenous population to Catholicism and assimilating them into the Spanish way of life.<sup>25, 26, 27</sup>

Spain's rule in Latin America was generally stable for 300 years. Cracks were beginning to show by the late 1700s, however, and there were repeated attempts to overthrow the Spanish. Growing nationalism and a growing commercial class combined with tensions among the elite groups. This created a serious threat to Spanish rule. By the mid-1820s, all of Spain's Latin American colonies, except Puerto Rico and Cuba, had achieved their



independence.<sup>28, 29, 30, 31</sup> Virtually all independence movements were led by the white aristocracy. These were fundamentally conservative movements with little interest in changing the region's social structures.<sup>32</sup>

Latin America's new leaders chose to maintain the feudal class system once the Spanish were defeated, rather than developing a representative government. They also granted the Catholic Church a special role in the government. The new governments maintained a paternalistic style of elite rule. Interest groups played the role of political parties, which often failed to develop. As these groups vied for power, much of Latin America was characterized by periods of dictatorship that were interrupted by anarchy. The region became isolated from the rest of the world and cut off from its Spanish markets. Much of the region declined in the years following their independence.<sup>33, 34</sup>



Skyline in Mexico © Jose Carlos Soto

## Post-Independence and Caudillismo

There was no history of or familiarity with self-rule, thus constitutions were insufficient to provide stability. Governments changed in quick succession and political institutions remained weak and underdeveloped. Two political ideologies dominated in the middle of the 19th century: the liberals and the conservatives.<sup>35</sup> These groups were factions of elites, rather than political parties in the modern sense. Power in Latin America passed regularly between these groups. They continued to control the bulk of politics throughout most of the 19th and 20th centuries.<sup>36</sup>

The conservatives were centered in the rural areas, for the most part. They represented a coalition of landowners, peasants, the Catholic Church, and often, the military. Conservatives supported the existing systems, favored monarchy, supported the Church, encouraged protectionist trade and monopolies, and were generally xenophobic. On the other hand, liberals tended to be located in the urban areas. They were generally made up of intellectuals, students, businessmen, and the middle class. Liberals tended to favor more democratic governance styles, were anti-clerical, favored federalism, supported more competitive enterprises, and encouraged foreign trade and investment. 38, 39

In addition to the conservative and liberal elite, there were also the *caudillos*. The term caudillo refers to a military person who assumed power, especially during unstable times. Most were local, but some rose to power on the national stage. The legitimacy of many caudillos depended on personal charisma and attaining power by violently overthrowing the existing government. Caudillos were influential actors in the Latin



American political systems and facilitated alliances between the military and the ruling parties of the day. 40, 41, 42



Construction site in Argentina
© Beatrice Murch

#### Latin American Political Culture

Latin America's feudal past still exerts a strong influence on politics and political systems. Hierarchy and authoritarianism are deeply embedded within Latin American culture. These philosophies rely on notions of elitism and the belief that the lower classes are unable to rule themselves. The feudal philosophy brought by the Spanish embodied the clear notion that there existed a natural ranking in the world. Above all there was God, followed by the king who ruled by holy mandate. Next were his nobles, the military, artisans, and craftsmen. Lowest in the hierarchy were the peasants. According to this doctrine, challenging one's place in the system was equivalent to challenging the will of God.<sup>43</sup>

Elitism also comes from this cultural legacy and the Spanish tradition of nobility, feudal landholdings, and racism. Although the form has changed, evidence of elitism is easily found. Many Latin Americans think that manual work is beneath them and disdain people in the manual professions, such as construction. Racism and concerns with skin color are a feature of life in many Latin American nations. 44, 45, 46

Feudalist traditions encouraged the development of patronage systems. Historically, many Latin American societies developed a strong sense of mutual obligations. This tradition is apparent today in many arenas. People often trade their support and votes for promises of political favors, government jobs, or access to financial gain. Few countries have a well-developed civil service system. Thus, it is easy for presidents to appoint their cronies to important and powerful positions.<sup>47, 48</sup>

These ideologies have been a powerful anti-democratic force throughout Latin America. Some change has taken place in the last century, but these traditional values run deep and continue to influence modern political life.<sup>49, 50, 51</sup>

## Democracy in Latin America in the 21st Century

Democracy in Latin America today refers to leaders and legislatures voted into office through elections in which most adults can vote. Those elections are free of blatant fraud and involve at least two parties, neither of which has complete control.<sup>52, 53</sup> In 1970, none of the Latin American nations would have been considered democratic under this definition.<sup>54</sup> Yet in 2014, all countries (except Cuba) are at least minimally democratic,



even though the nature and extent of democracy varies. 55, 56, 57, 58

The 2013 World Freedom Report declared all Latin American nations were electoral democracies, except Cuba, Honduras, and Venezuela. Ten countries were designated free, with Chile, Costa Rica, and Uruguay receiving the highest possible scores. All other Latin American nations, except Cuba, were categorized as partly free.<sup>59</sup>

Surveys of Latin Americans show that most prefer democratic rather than autocratic regimes.<sup>60,61</sup> Support, however, is far from universal. On average, 56% of Latin Americans believe democracy is preferable. The greatest support is in Venezuela (87%), Argentina (73%), and Uruguay (71%). The weakest support is in Honduras (44%), Guatemala (41%) and Mexico (37%).<sup>62</sup> In spite of positive beliefs about democracy, 54% of Latin Americans would prefer an autocratic government if it meant greater economic stability and security.<sup>63</sup> In Guatemala, where crime rates are high, 44% said that they preferred the army to govern.<sup>64</sup>

Support for, and satisfaction with, democracy are different concepts. Again, there are wide variations among Latin Americans. Only 39% of Latin Americans are satisfied with democracy. Uruguay far outpaces the rest of the region, with 82% of its people saying they are satisfied. The least satisfied populations can be found in Peru and Paraguay (25%), Mexico (21%), and Honduras (18%).<sup>65</sup>



Media in Mexico City
© Oxfam International

## Populism and Democracy

Populism, rather than socialism, is commonly regarded as the main opponent to democracy in Latin America.<sup>66, 67</sup> Populism began as a way to fix the social dislocations and inequalities in wealth caused by capitalist economic policies.<sup>68</sup> Today, modern populists continue to appeal to the poor and disenfranchised. They do so by promising to raise living standards and bring greater power to the masses. These promises are commonly accomplished by increasing state control over economic and social institutions.<sup>69, 70</sup>

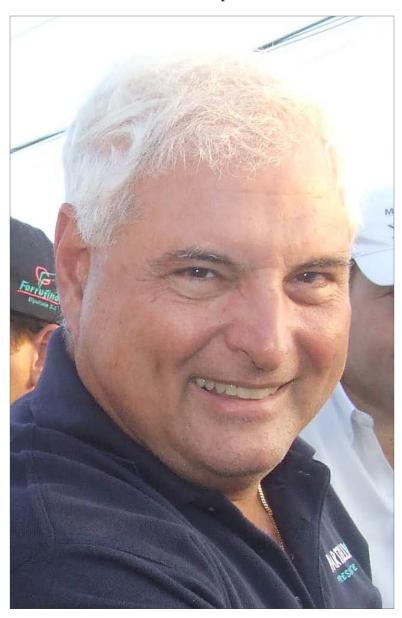
Populists come from both the right and the left. Some have called for broader state controls, while others have favored more market-based economic

strategies. In general and regardless of their political leanings, populists tend to rely on nationalism and dissatisfaction with foreign influence and intervention.<sup>71,72</sup> They have a tendency to stifle dissent and to label dissenters a threat to national security. Populist governments also try to control the media and to take very activist roles in civil affairs. This limits political participation and marginalizes dissenters.<sup>73</sup>

Populists are usually skilled orators who rely on the charisma of their leaders to create a



sense of identification with the masses. Many are current or former military leaders who rely heavily on the strategy of getting people out into the streets to demonstrate against those in power.<sup>74</sup>



Ricardo Martinelli, President of Panama Courtesy of Wikimedia

# Preferred Leadership Attributes in Latin America

Data suggest that there are significant degrees of shared cultural and leadership values across Latin America. Several attributes are considered universal characteristics. These include the ability to inspire, to anticipate, and to be visionary. Other universal attributes include being an integrator, a good administrator, group oriented, collaborative, diplomatic, and convincing. On the other hand, Latin Americans universally find malevolence and face-saving or being selfcentered and autocratic undesirable characteristics that hinder one's ability to lead effectively.

Some important differences emerge among countries. For example, the tendency to avoid intra-group conflict is seen as negative in Colombia, El Salvador and Peru. Leaders in these countries are expected to manage internal conflicts, rather than avoid them. Modesty is considered a poor leadership trait in Argentina, Bolivia, and Mexico. Leaders in these countries are expected to be brash and bold.

Willfulness is a positive element in most countries. However, being willful and determined in Columbia is considered an impediment to good leadership. Most Latin Americans think that being autonomous is a negative leadership trait. Leaders who willingly separate themselves from their followers to pursue independent ideas are seen as

ineffective, except in Argentina where such a characteristic is marginally positive.<sup>81,82</sup>

These attributes together demonstrate the importance of two values. First, most Latin Americans place a high value on charismatic and value based attributes. They prefer leaders who have strong values and dynamic personalities that inspire people and command loyalty. Second, Latin Americans place a high value on the ability to build a team, establish consensus, and integrate various groups.<sup>83</sup> To a lesser extent,



people expect their leaders to be humane. This would include attributes of generosity, compassion, modesty, patience, and the ability to remain calm.<sup>84</sup>

Two negative dimensions are somewhat important among most Latin Americans. Leaders who are self-centered, status-conscious, procedural, and who fuel conflict are not likely to be viewed as good leaders. Similarly, leaders who neither engage nor involve their followers and make autonomous decisions are more likely to receive negative marks. 85, 86



Porfirio Diaz © Aurelio Escobar Castellanos

### 20th-21st Century Developments

Several important transitions occurred in Latin America in the last half of the 20th century. These involved the role of the military, as well as the role of civil wars and international interventions in Latin America. Military coups deposed numerous constitutional governments in the 1960s and 1970s.87 Civil wars or international intervention plagued much of Central and South America during the 1970s.88 By the end of that decade, the region was transitioning to constitutional democracy and by the 1980s, all of the South American military governments had been replaced by civilian rule. No active duty military officer has held office in South America since 1990. This marks a change in military to civilian rule. It also marks a change in national military roles in Latin America. Military coups are no longer as important as they once were to gaining power. While the military remains influential, it is subordinate to civil authority.89,90

Another important shift has been the decline in established political parties and the realignment of coalitions. The Liberal and Conservative parties were once the traditional sources of political power in some countries. Yet, these parties

are now facing serious challenges.<sup>91</sup> Other parties have also collapsed, including the largest in Peru. Some countries (e.g. Peru and Venezuela) have moved toward a "noparty" system, where political leaders are charismatic personalities rather than party politicians.<sup>92</sup>

Generally, there are significant challenges to the survival of democracy. There have been substantial changes to political systems in the last 50 years. Military rule is less likely and



the overthrow of civilian leaders by the military is less frequent. When they do occur, they are less likely to succeed. New parties are emerging and the realignment of old parties is ongoing. Greater cooperation between the legislative and executive branches of government means more progress and fewer crippling deadlocks.<sup>93</sup>



Enrique Pena Nieto © PresidenciaMX / Wikimeida.org

## Mexico

## Historical Development

exico's post-independence government merely replaced the colonial bureaucracy with a series of strongmen who ruled largely by force. Politics became based on the personalities of the men in office, rather than being institutionalized. This feature of political life still characterizes Mexican politics. Hexico's political system is often seen as highly undemocratic. Power is centralized around the president, who often rules with oligarchic powers. In practice, Mexican presidents have selected their successors, removed state governors or legislators they did not like, and exercised control over union leaders. Hexican presidents have selected control over union leaders.

Mexico was plagued by three major civil wars between 1810 and 1867. There were 48 turnovers in the executive position in the 30 years between 1825 and 1855. Hexico adopted a constitution in 1857 to end this cycle of presidential succession by coup. Yet there was still a problem with the existing political system, which was based on the personality of President Porfirio Díaz (1876-1910).

He exercised total control over the government and military. He was also supported by a hierarchy of friends and regional *caudillos*. <sup>97, 98</sup>

Dissatisfaction with the Díaz government erupted into revolution in 1910, which lasted until 1920.<sup>99</sup> Mexico's provisional president, Carranza, presented a draft constitution to the Congress in 1917, following failed meetings with revolutionary leaders. This draft constitution called for the establishment of democratic institutions and the implementation of a democratic system of governance. The document was adopted, but it would take more than 80 years before those calls took shape.<sup>100, 101</sup>



The Institutional Revolutionary Party (PRI) was founded in 1929. They ruled uninterruptedly, from the Mexican Revolution, until they lost the presidency in 2000 to the National Action Party (PAN). <sup>102, 103, 104</sup> Before they lost the election in 2000, PRI candidates controlled the federal legislature and the governorships of all states. They had made democracy nearly impossible in Mexico, essentially turning it into a one-party state. <sup>105, 106, 107</sup>



Lake Atitlan, Guatamala © Pedro Szekely

#### Contemporary Mexican Politics

The PRI began losing legitimacy and support around 1970. Politics opened up and new parties emerged, which offered legitimate challenges to the PRI. 108 Today, there are three main political parties in Mexico: the centrist PRI, the rightist PAN, and the PRD (Democratic Revolution Party). The PRD formed in 1986. It is a left-leaning political party with a major focus on social reform. 109, 110, 111 Mexico has several smaller parties that sometimes form alliances with the larger parties. These include the Green Party (PVEM), the Labor Party (PT), and the New Alliance (PANAL). 112, 113

Since the 1990s, power sharing has become greater than at any time in the nation's history. Power remains highly centralized, yet it is no longer possible for the president to dominate national politics. State and municipal governments are more independent, as is the federal legislature.<sup>114</sup>

The PRI returned to power in 2012, when Enrique Peña Nieto won the presidency and the PRI gained the largest number of legislative seats. The PRI was forced to form alliances with several smaller parties, however, in order to control the legislature. The PRI initiated a series of structural and political reforms during their first year in power. The PRI initiated a series of structural and political reforms during their first year in power.

The future of democracy in Mexico does not rest solely in the hands of the political parties. Ultimately, democracy is determined by the people and by their willingness to participate in and support the institutions. Mexicans have become more likely to participate in political affairs since 1980. However, they remain skeptical of democracy, politicians, and the political system. Many continue to follow the practices of clientelism, which involves political favoritism and patronage. 120, 121

Mexico is well into its democratic transition, but its democracy is still fragile and facing serious challenges. Among the most significant are an increase in the rule of law, a more independent judiciary, greater freedom and transparency in the electoral process,



more government accountability, and lower corruption. <sup>122, 123</sup> Another worrisome element is the lack of support for democracy in Mexico. Only 37% of Mexicans support democracy, according to a 2013 poll. This is the lowest of all Latin American countries. <sup>124, 125</sup>

## Central America

## The Early Settings—Politics before 1970

than the rest of Latin America. The demographics of the various countries differed, but an independent peasant class existed in all of them. In Guatemala, half the population was indigenous and they were not politically active. In El Salvador and Honduras, the population was much more diverse and most remained employed in agriculture. Nicaragua's economy was more diversified and still had the same general political organization. <sup>126</sup> In Central America, power rotated between the two main political groups—the Liberals and the Conservatives – as it did in the rest of Latin America. The degree of competition also varied by country between political groups. As a result, one group or the other tended to stay in power longer. In other nations, power rotated more regularly. <sup>127, 128</sup> By the 1920s, however, the liberals were in power throughout Central America. <sup>129, 130</sup>

The demographic and social differences among Central American countries in the mid-20th century directed them along different political paths. Some nations had dictatorial military regimes, some had progressive democracies, and some had civilian dictators. <sup>131</sup>, <sup>132</sup> Panama's political development was different from the rest of the region. It gained independence in 1903, with the help of the United States. This meant that instead of raising an army, Panama opted instead for a relatively weak police force. The political system was based on civilian transitions rather than on a succession of military coups. Panama has been a constitutional democracy ruled by liberal commercial oligarchs for most of its recent history. <sup>133, 134</sup>

Guatemala, El Salvador, and Costa Rica followed more democratic paths than Honduras and Nicaragua. The regional conflicts in Honduras and Nicaragua meant that there was little consolidation. Furthermore, there was no clear elite class against which people could direct dissatisfaction. Protest movements did occur, yet they tended to be isolated and confined to specific regions rather than national in nature.<sup>135</sup>

The liberal reforms of the early 20th century were not particularly successful. Democracy movements proved unsuccessful in all countries, except Costa Rica. Brutal and repressive dictatorships emerged instead, which held control over the region until the 1970s. 136, 137





Daniel Ortega © Cancilleria Equador / Wikimedia.org

#### 1970-2000

Hardships caused by failed economies existed throughout Central America during the 1970s and 1980s. Citizen and elite support for the governments waned. This led to the military overthrow of oligarchic governments in Guatemala, El Salvador, Nicaragua and Panama. Democratic reforms began in each country following these military coups. <sup>138</sup> Each nation began setting safeguards in place to promote and maintain democratic institutions. One main feature included reducing the size of the militaries and making the military subject to constitutional rule. <sup>139, 140</sup>

Central America's democratic gains face several major challenges. Its geographical position between Colombia and Mexico places Central American democratic stability in jeopardy.

Democratic institutions and politicians constantly face the threat of corruption from narco-gangs. 141, 142 For example, Honduras has now become a major transit point for illegal drugs. As much as 87% of all South American cocaine smuggling flights land first in Honduras, before heading to the United States or Mexico. 143, 144 Drug cartels have set up shop in Honduras and the country is in danger of becoming a failed state. 145 Successful challenges from the leftist political parties could signal an important shift in the path towards democracy. The 2014 election of a leftist president and claims of electoral fraud in El Salvador could pose a risk to that nation. 146, 147 Proposed changes to Nicaragua's constitution could also make democratic transition of power more difficult. Some argue that these changes are designed to concentrate power firmly in the hands of the leftist Sandinista president, Daniel Ortega. 148 The region's increasing militarization is another major threat to democracy and political stability. This is especially true in states like Panama, which historically has not relied on its military for political change. 149

## South America

## Nineteenth Century Political Development

fter gaining independence, many South American nations faced the prospect of creating governments that would be viewed as legitimate by their newly freed citizenry. For the most part, South Americans developed republics. Constitutional governments were predicated on a belief that government should be representative. Governments were responsible for securing the rights and



liberties of the people. By mid-century, most countries had moved away from these ideals and towards centralized governments.<sup>150</sup>

A few social and economic transformations took place, yet class relations remained essentially unchanged. Throughout the region, power continued to rotate between the conservative and liberal elites, each trying to maintain their rule through civil war and fraudulent elections. The masses were persistently excluded from power and largely controlled by the dominant elite classes.<sup>151</sup>

Political instability characterized the region throughout the mid-19th century. Most arguments centered on who should have power. The elites tended to coalesce around either the Conservative or the Liberal parties, which were elite factions rather than true political parties. Most countries were ruled by oligarchs or liberal dictators. <sup>152, 153</sup> By the beginning of the 20th century, military dictatorships took over as the most common form of government. <sup>154</sup>



Michelle Bachelet © b1mbo / Wikimedia.org

## The Twentieth Century

Conventional democratic systems with broader middle class participation emerged in Argentina, Chile, and Uruguay. Ecuador expanded democratic reforms and was the first Latin American country to allow women the vote. 155 Peru's path toward greater citizen involvement went even further, as it tried to include the indigenous population. Venezuela, on the other hand, continued to be ruled by a military dictatorship, which did not end until 1935. 156

Elite factions continued to rule the political sphere. The liberal democracies that were in place were based on agreements between elite factions. These agreements were built on maintaining elite power bases. Arrangements often included promises that the group in power would not try to threaten the interests of the other group.<sup>157</sup>

The world depression of the 1930s created serious challenges for South America's march toward

democracy. Many countries were forced to enact emergency measures to deal with failing economies. In many cases, governments became larger. The threat of revolution from the poor led some governments to adopt constitutional reforms aimed at ending poverty and helping the poor.<sup>158</sup>

For the first half of the century, new ideologies from Europe and North America



began to infiltrate. Socialism was strong in South America, especially Chile, but never gained a strong foothold. Even Cuba's socialism was not adopted by most governments. However, it did generate an uptick in guerilla activities, especially in rural areas. Many governments responded by strengthening their militaries. At the same time, they adopted new land reform policies designed to address the root causes of the insurgents.<sup>159</sup>

Most South American countries had some sort of democratic political system in place after 1950. Women had gained the right to vote in all countries and they began to win political positions. Women even ascended to the presidency in Argentina (1974-1976, 2007 to present), Bolivia (1979-1980), and Chile (2006-2010, 2014-present). <sup>160, 161, 162</sup> Nevertheless, increasing populism and mounting economic problems pushed many countries away from traditional democracy and towards a bureaucratic authoritarianism. This meant the military ruled, but civilians controlled economic policy. <sup>163</sup> By 1980, only Colombia and Venezuela had democratically elected civilian governments. <sup>164, 165</sup>



US Army in Guatamala ©, Robert R. Ramon / US Army

# Democracy and Political Trends in South America

emocracy in South America has always been fragile. Democratic ideas have been widespread throughout the region. Yet, most attempts to establish democratic states have been unstable and unsuccessful. 166 Some suggest that economic crises led to the fall of liberal democratic leaders. Military dictatorships are arguably less vulnerable to economic crises and may be seen as better able to handle problems. 167, 168 Others say that there is a regional cultural bias against liberal values where there is a long tradition of

autocracy. 169, 170 Still others contend that the state has never been well established anywhere in South America. They argue that it has been dominated economically, politically, and socially by foreign powers, particularly Spain. 171

Democratic institutions are again under siege in South America, except in Bolivia, Chile, Colombia, and Uruguay. Democracy is firmly entrenched and functioning well in these 4 countries. <sup>172, 173, 174</sup> As the economy continues to slow down, South Americans are demanding more from their governments. They want more transparency, accountability, and social services. <sup>175</sup> Elections in the region returned ruling parties to power in Ecuador and Venezuela. Socialist-leaning presidents won in Ecuador, Venezuela, and



Chile. Those to the center-right won in Paraguay. Generally, the results show a trend towards the middle of the political spectrum, with a few exceptions. 176, 177, 178, 179 Three nations will hold elections in 2014. The sitting candidates are likely to be the winners. 180, 181



Charles E Magoon © Harris & Ewing / Wikimedia.org

## Caribbean (Cuba)

1900-1959

uba's political development over the last 125 years is different from many of its Latin American neighbors. However, its colonial development was similar to the rest of Spain's New World colonies, though with several significant differences. First, Cuba did not achieve its independence until 1902, far later than all of the other colonies, except Puerto Rico. Next, the Catholic Church did not play an important or significant role in the life of Cuba or of Cubans. Slavery also continued in Cuba after it had been abolished in the mainland colonies. There was no well-established indigenous culture because the indigenous tribes had been nearly destroyed in the early years of colonization. Finally, a landless working class developed in Cuba - one that was fundamentally different from the peasant class typical of most mainland colonies. 182, 183

Cuba's first years of independence were turbulent. The nation had a two-party system in place. This system was based on the traditional ideologies of the liberal-conservative dichotomy that emerged throughout Latin America. The first elections in 1902 placed a conservative candidate in office.

The conservatives were again victorious in 1906, but the elections were broadly viewed as fraudulent and violent. The liberals refused to accept the results, thus prompting the United States to get involved. The conservative president and his cabinet resigned. This prompted President McKinley to send U.S. troops to occupy Cuba. McKinley appointed Charles Magoon the island's provisional governor. Magoon stayed in power until 1909, when Liberal party candidate, José Miguel Gómez, assumed the reins of power. Magoon the island's provisional governor.



Corruption characterized the government of Cuba in the years that followed. The office of president was filled by 15 different men between 1909 and 1952. Arguably, the most notorious of these was Juan Batista, who was president from 1940-1944. Batista returned to power in a coup in 1952 and ruled as a dictator, until he was deposed in 1958 by revolutionary forces led by Fidel Castro. <sup>188, 189</sup> Under Batista, the people had no political power. <sup>190</sup>



Raul Castro © Government.ru / Wikimedia.org

#### 1959-2014

Fidel Castro assumed power in January 1959 and would remain Cuba's leader until he passed power to his brother, Raúl, in 2008. Cuba adopted a Soviet economic model under Castro. All planning and control were centralized under the authority of the state, which was synonymous with Castro. There was no dispersion of power with the 2008 change in government. The Cuban government remains totalitarian, directing control over virtually all aspects of life in the nation. That power was vested in Fidel Castro until he stepped down.<sup>191</sup>

The Communist Party of Cuba (PCC) has been the only recognized party since 1965. 192 There are no competitive elections for the official positions of power in the National Assembly. 193 Members of the National Assembly are nominated by PCC officers via the commissions they chair. Voters

then vote for the candidates, or leave the ballots blank. Blank ballots are officially voided and some estimates suggest that up to 24% of all such ballots cast in 2013 were voided. This is about an 11% increase over the 2008 elections. 194

An ailing Fidel Castro passed power to his brother in 2006, who was officially elected to office in 2008. <sup>195, 196</sup> In his term as president, Raúl Castro has implemented a series of economic and political reforms. Most of those reforms, however, have been economic. The state now exercises less control over an expanding private sector and controls fewer areas of agricultural production, services, and other economic sectors. <sup>197</sup> Castro has promised to step down at the end of his current term in 2018. <sup>198</sup>



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## **Overview:** Chapter 4 Assessment

1. Latin America's feudal history made it more difficult to establish democratic institutions.

#### **TRUE**

Latin America's feudal traditions of autocratic rule, along with domination by the Church, made it more difficult to develop the infrastructure necessary for the creation of democratic states.

2. In 2014, most governments in Latin America were centrist liberals.

#### **FALSE**

By 2014, most of the conservative governments had been replaced with administrations that are more leftist.

3. Populism is often seen as the main threat to the development and maintenance of democratic institutions in Latin America.

#### **TRUE**

Populism, rather than socialism, is commonly regarded as the main opponent to democracy in Latin America.

4. More than two-thirds of Latin Americans prefer democratic to autocratic forms of government.

#### **FALSE**

On average, 56% of Latin Americans believe democracy is preferable.

5. Mexico has three major political parties.

#### TRUE

There are three main political parties in Mexico: the centrist Institutional Revolutionary Party (PRI), the rightist National Action Party (PAN), and the leftist PRD (Democratic Revolution Party). Mexico has several smaller parties including the Green Party (PVEM), the Labor Party (PT), and the New Alliance (PANAL).



## Final Assessment

1. Latin America supplies more oil to the United States than Saudi Arabia.

#### TRUE OR FALSE?

2. Indigenous people are the largest ethnic group in Latin America.

#### TRUE OR FALSE?

3. Latin Americans are generally more collectively oriented than people in the United States.

#### TRUE OR FALSE?

- 4. The Spanish relied mostly on military force to conquer all regions of Latin America.

  TRUE OR FALSE?
- 5. Crime and violence are on the rise in Latin America.

#### TRUE OR FALSE?

6. Neo-liberals believe in free-market economic policies and trickle-down economics.

#### TRUE OR FALSE?

7. Commodities exports are no longer a central part of Latin America's economic engines.

#### TRUE OR FALSE?

8. The import substitution industrialization model replaced the commodities export model between 1930 and 1980 as a means to improve the Latin economies.

#### TRUE OR FALSE?

9. Drug violence is a significant hindrance to economic growth in Central America.

#### TRUE OR FALSE?



10. Cuba's main export is sugar.

#### TRUE OR FALSE?

11. Mestizos are the largest group in Latin America.

#### TRUE OR FALSE?

12. There has never been a female president in Latin America.

#### TRUE OR FALSE?

13. Central America is the poorest region in Latin America.

#### TRUE OR FALSE?

14. Mexico has the highest murder rate in Latin America.

#### TRUE OR FALSE?

15. Except for Argentina and Chile, all Latin American nations are medium development countries.

#### TRUE OR FALSE?

16. The ideas of hierarchy and elitism are widely held views in Latin America.

#### TRUE OR FALSE?

17. The ability to avoid internal conflicts is a universally positive attribute of leadership throughout Latin America.

#### TRUE OR FALSE?

18. Mexicans exhibit the lowest amount of popular support for democracy in Latin America.

#### TRUE OR FALSE?



- 19. Latin American populism is a left of center political philosophy. **TRUE OR FALSE?**
- 20. Military strongmen continue to hold presidential offices in South America. TRUE OR FALSE?



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