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CRITIQUES

Against Essentialism:

Latin American Labour History in Comparative Perspective. A Critique of Bergquist.

Jeremy Adelman

CHARLES BERGQUIST'S RECENT WARNING to Latin American labour historians is timely and important.[1] It admonishes the uncritical use of historical methods forged in developed societies and applied to less developed societies. Students would do well to contemplate Bergquist's comments. But his warning is too strong, and prematurely rejects developments in labour history in North America and Europe. What is more, Bergquist's suggestion that dependency theory more faithfully captures the experience of Latin America's workers misleads, and itself implies the application of Eurocentric categories to Latin America. Finally, the logic of his argument precludes comparisons of Latin America with developed societies, leaving intact an unfortunate dichotomy between classic and aberrant cases of social development. He sacrifices at least one potential contribution of Latin American labour history: its power to denaturalize the models of class formation of the so-called developed world.

Bergquist's phillip can be summarised as follows. First, conventional approaches to labour history, be they liberal or Marxist, have downplayed labour's important role in Latin American national developments because their primary concern is with elites and why local elites have failed to constitute fully fledged

[1]Charles Bergquist, "Latin American Labour History in Comparative Perspective: Notes on the Insidiousness of Cultural Imperialism," *Labour/Le Travail*, 25 (1990).

Jeremy Adelman, "Against Essentialism: Latin American Labour History in Comparative Perspective. A Critique of Bergquist," *Labour/Le Travail*, 27 (Spring 1991), 175-184.

bourgeoisies.[2] When these paradigms do concern themselves with workers, they privilege the study of organized urban industrial labourers, to the neglect of peasantries, or semi-rural workers who historically formed the bulk of Latin American labour forces. Because conventional Marxist and liberal models see only in the classic proletariat a truly modernizing class, all other subaltern classes are dismissed as backward or transitional social formations. However, one is left wondering (since Bergquist cites no one) who is being criticized. Certainly vulgar Marxists or modernization theorists may fail to appreciate the uncommon nature of Latin American working classes, but there is a long and august tradition of labour history which takes as its point of departure the peculiar nature of Latin American workers.[3]

Second, seeing labour through the lens of the 'new social history' distorts important factors shaping the lived experience of Latin American workers. This more recent trend is the main subject of his critique, and is castigated both as 'an insidious form of cultural imperialism' (189) and for reasserting 'the insidious dominion of orthodox Eurocentric paradigms over the study of Latin American labour history' (192). His venom is directed at the new fad for imposing research and publication agendas used to explain the developed world's failure to sustain combative working-class movements. Thus the intrinsically more-revolutionary Latin American workers (who have supposedly been less tempted to buy into the hegemonic system) cannot be understood by using the developed societies' culturally overdetermined tools of analysis. Again, one is left wondering whom he has in mind, since he again cites no one, offering as evidence of such sins the 1987 Rio de Janeiro conference where E.P. Thompson displaced Marx as the new guru, as if this were representative of a new round of academic imperialism.[4]

[2]This point is also made in his book, *Labor in Latin America: Comparative Essays on Chile, Argentina, Venezuela, and Colombia* (Stanford 1986), 1-9. This charge is directed at the only other text on Latin American labour history: Hobart A. Spalding Jr., *Organized Labor in Latin America: Historical Case Studies of Workers in Dependent Societies* (New York 1977). Readers looking for general works on the subject will be disappointed by the paucity of supply. An alternative text is Ricardo Melgar Bao, *El movimiento obrero latinoamericano: Historia de una clase subalterna* (Madrid 1988).

[3]The list is so long, it hardly bears itemising. An example which towers above most is John Womack Jr.'s (a Marxist) *Zapata and the Mexican Revolution* (New York 1968), which, if not explicitly, at least implicitly makes good use of the new social history.

[4]One collection which does borrow self-consciously from the works of E.P. Thompson, Raphael Samuel and the like, is Diego Armus, ed., *Mundo urbano y cultura popular: estudios de historia social argentina* (Buenos Aires 1990). The new social history trend is probably most pronounced in Argentina, and especially among the members of the Centro de Investigaciones Sociales sobre el Estado y la Administración. Those who cannot read Spanish will find a selection of recent work in Jeremy Adelman, ed., *Essays in Argentine Labour History, 1870-1930* (forthcoming, Macmillan).

Both problems of the new labour history stem from a common root: the uncritical application to Latin America of theories or approaches devised in the industrialized world. One can only share Bergquist's concern that our prisms be appropriate to the subjects of our study, but the degree to which he rejects the so-called 'new social history' displays a narrow vision of recent developments in working class history in North America and Europe. Moreover, his veiled support for dependency or world-systems theories as more appropriate to Latin America overlooks one important aspect of these familiar approaches: they too reproduce a Eurocentric image of development.

The combination threatens to push Latin American labour history away from comparisons with other continents and into a sort of exceptionalism which labour historians in Canada, the United States, and Europe finally are beginning to shake off.

The New Social History

BERGQUIST SETS UP a straw man in the form of new social history. By making his job easy for himself, he misconstrues what the new social history aimed to accomplish. Labour historians in Europe and North America were confronted with a history of class struggle which did not conform to the prescribed models found in the writings of Marx, Engels, or the generation of Second International activists who formalized a Marxist approach to labour. Nowhere did labour, with the arguable exception of Germany, flock to revolutionary parties or movements. Yet, despite that failure, revolutionary consciousness was taken to be the norm. What had to be explained was why workers failed to become revolutionary subjects. Early efforts relied on everything from the special factors of United States history (like the frontier, democracy, and the like), to the hoodwinking powers of European nationalism. Underlying the early generation of labour history was the failure of class consciousness.

With the writings of Thompson, Gutman, and others came a response.[5] Labour was not as docile as portrayed. The image of an obsequious labour movement was especially entrenched in the US, and the 1960s generation of labour historians aimed their work at debunking the liberal myth of consensus.[6] Moreover, because

[5]For a useful, if slightly-dated summary of the point of the new labour history, see David Brody, "The Old Labor History and the New: In Search of an American Working Class," *Labor History*, 20 (1979), or more recently, Sean Wilentz, "Against Exceptionalism: Class Consciousness and the American Labor Movement, 1790-1920," *International Labor and Working Class History*, 26 (1984).

[6]Whatever pitfalls may exist in David Montgomery's *The Fall of the House of Labor: The Workplace, the State, and American Labor Activism, 1865-1925* (New York 1987), it should be seen as part of an ongoing struggle to subvert the stubborn legacy of consensus history. Bergquist unfairly picks at Montgomery's painstaking documentation of the degree of combativeness of United States workers for failing to come to terms with "large-scale structural, economic and political change." (195) For more insightful comments on Mont-

class consciousness had been measured exclusively by the degree to which workers supported revolutionary socialism, there was little room left for alternative expressions of collective discontent. The new labour history was born of the dual necessity of describing not only the degree to which labour fought the designs of employers and the state, but also the variety of manifestations of this contest. Thus, new trends in labour history revived the image of labouring classes struggling to defend their distinctive identities. At once, the new labour historians were forced to broaden their understanding of class-conscious expression beyond the straitjacket of revolutionary socialist political parties. Hostility to oppression and exploitation was exemplified in syndical forms (through union organization and solidarity), religion, ethnic bonding (and even racism), neighbourhood organization, and women's struggles for equality. In short, the new social history amplified the potential expressions of class.

This brought with it a new crop of problems for historians, which Bergquist may be correct to lament. As possible expressions of class-consciousness and discontent proliferated, social history fragmented into particularist studies, losing an over-all perspective of the political, economic, and military forces at play. Bergquist especially holds up E.P. Thompson on the familiar charge 'of ignoring the issue of political power,' (193) as if this were self-evident and accepted by all.[7] The 'Thompsonians' (whoever they are, for again he fails to cite any) also are upbraided for favouring impossible (and allegedly expensive) efforts to particularize Latin American labour history into unrecognizable fragments. Even if this were the case, the radical nominalism into which *some* historians fell is not a generic feature of *all* the new social or labour history.[8] By making a straw man of labour historians who lost sight of the big picture, Bergquist loses sight of the whole point of new trends in labour history: to restore the voice of workers which was smothered in mechanistic prescriptions of how workers were supposed to manifest their class consciousness. This is an important point, and I shall return to it shortly.

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gomery, see the collection of articles in *International Labor and Working Class History*, 32 (1987) and *Labor History*, 30 (1989).

[7]He cites criticisms of Thompson by Perry Anderson, Elizabeth Fox-Genovese, and Eugene Genovese as having abstracted the study of workers from class struggle. Bergquist himself cites one of Thompson's self-defenses without, evidently, having read it. In "Eighteenth-Century English Society: Class Struggle Without Class?," *Social History*, 3 (1978), Thompson is unequivocal: "in any given society we cannot understand the parts unless we understand their function and roles in relation to each other and in relation to the whole." (133)

[8]Bruce Laurie, *Artisans into Workers: Labor in Nineteenth-Century America* (New York 1989); Nell Irvin Painter, *Standing at Armageddon: the United States, 1877-1919* (New York 1987), and the syntheses included in Ira Katznelson & Aristide Zolberg, eds., *Working Class Formation: Nineteenth-Century Patterns in Western Europe and the United States* (Princeton 1986).

What Bergquist wants is laudable: studies which respect the central role of workers in general economic and political developments. Should this mean, however, that specific studies of gender, ethnicity, region, or conjuncture always be grounded in and determined by the big picture? If research on women, minorities, workers from regionally disparate areas, or even cycle-specific studies have taught historians anything, it is that pat two-dimensional images do a disservice to subaltern classes. Some degree of particularism may be necessary to revive the buried voices of women, workers or ethnic minorities. To heed Bergquist's call would come close to resuscitating an older (white, male-dominated) tradition of appraising labour's role exclusively as revolutionary agents, as if workers were meant for nothing but destroying capitalism, and as if workers' identity were patterned exclusively by their work experience.[9]

By giving causal primacy to the exchange of labour for wages as the source of consciousness, Bergquist implies that class consciousness can only be manifested in one way.[10] A truly big picture, however, would be more generous. Bergquist notes recent advances in the social sciences and hold-over traditional history (such as Katznelson and Zolberg's *Working-Class Formation*; Gordon, Edwards and Reich's *Segmented Work, Divided Workers*; and Eric Hobsbawm's *The Age of Empire*) which help restore the the big picture. But if the social sciences have helped historians at all, it is by dismantling some of the causal mechanisms which have been invoked to appraise the march of history.[11] Yet Bergquist's big

[9]This is a tricky point. Class is central to the study of labour, but it helps to distinguish between class *position* and other things we may want to say about classes. Cohen argues that a person's class is objectively determined by the location in the network of property relations. Culture or politics do not define class position. G.A. Cohen, *Karl Marx's Theory of History: A Defense* (Oxford, 1982) esp. 73-7. This is different from class formation or class consciousness. Since classes existed from the day property was invented, Cohen's search for categorical rigour is a nonproblem for historians. It is a problem when discussing dynamic, historical understandings of specific classes associated with specific modes of production.

[10]This is most notoriously evident in his book, in which political parties and the state in general are practically absent.

[11]Feminists are at the forefront of dethroning 'work.' See Gerda Lerner's collection, *The Majority Finds its Past* (New York 1979) and Joan Wallach Scott's *Gender and the Politics of History* (New York 1988). The jury, though, is still out on whether gender should be the master category, or whether it is only one of several dimensions of experience. For a useful recent review, see Kathryn Kish Sklar, "A Call for Comparisons," *American Historical Review*, 95 (1990). Ira Katznelson has given community its place in *City Trenches: Urban Politics and the Patterning of Class in the United States* (New York 1981). For a discussion of the need to shift the ground from constituted subjects in history, to subject positions, in which actors constitute themselves in a pluralist milieu of forces, see Ernesto Laclau, "The Hegemonic Form of the Political," in Christopher Abel & Colin M. Lewis, eds., *Latin America, Economic Imperialism and the State The Political Economy of the External Connection from Independence to the Present* (London 1985); and with Chantal Mouffe,

picture remains tied to the workplace and in his book, one workplace in particular: the export-staple producing sector.

Bergquist accords so much causal weight to the analysis of work in the export sector that he offers a model which dichotomizes class formation according to the capital requirements of production. Where capital requirements are high (as in Chilean mining), it will tend to be foreign-owned and concentrated in the hands of few, and will largely sap the national economy's capacity for economic development. Such a sector will yield a working class more disposed to be anti-capitalist (and there is only one way to do *that*), and probably anti-imperialist. On the other hand, where capital needs are low (as in Argentine agro-pecuarian exports), it will be locally owned and more widely distributed. Accordingly, Bergquist demonstrates how Argentine workers failed to become anti-capitalist and forged a weak socialist movement, leaving them open to be captured by the charismatic Juan Domingo Perón.[12]

This neat formula hinges on its predictive capacity. Yet, Bergquist's argument and defense of his theory flies in the face of contradictory evidence. That Argentines developed the hemisphere's most important democratic socialist movement before World War II, and enjoyed greater union strength and negotiating muscle with the state long before Perón's arrival on the stage, is reason enough to suspect the model. But the gulf between paradigmatic preferences and the facts should not surprise us. Bergquist's history of labour in Latin America is an explanation of what we know was the end result, but not an appraisal of the lived experience of the continent's workers. It shares, along with many monocausal explanations of history, a teleological fallacy.

The Relevance of Dependency

THIS TELEOLOGICAL FALLACY stems from a common, but misguided understanding of development. And herein lies the second problem of Bergquist's critique, and why his call for a return to dependency is crucial to his agenda. The dependency approach is celebrated for its 'holistic analysis, built on the comparative method,' as it 'shows' how 'comparison is a highly efficient, resource-saving mode of historical analysis.' (197-8)

There are two problems here. The first is logical: Latin American economies are dependent, and only countries that share affinities can be compared. Therefore, only Latin American countries can be compared to one another. They cannot be compared to industrial societies. What is more, as far as Latin American history is concerned, dependency *is* comparative history. This syllogism stumbles on two counts. First, it is unclear whether dependency is meant to mean the 'hard-core' type associated with André Gunder Frank and retooled by Immanuel Wallerstein,

Hegemony and the Socialist Strategy (London 1985); Norberto Bobbio, *Which Socialism?: Marxism, Socialism and Democracy* (Oxford 1986).

[12]This is the overarching approach and conclusion of *Labor in Latin America*.

or whether the 'soft-core,' dialectical approach of Cardoso and Faletto is at stake. If Bergquist means the soft-core theorists (and presumably he does) there is room for the analysis of local class relations.[13]

The second problem of the syllogism lies in an overly rigid notion of the comparative method. Leibniz distinguished between qualitative and quantitative relations (and hence between relations of comparison versus relations of connection), suggesting that at least two possible tracks for the comparative method exist. Marc Bloch, one of the early founders of the 'new' social history, used this difference with exemplary skill. Good comparative history does not require that the units of analysis display differing quantitative degrees (but the same qualitative core), of say, dependency, or industrialization, as preconditions for study. They *can* be qualitatively different.[14]

Labour historians in Canada, the United States and Europe should feel free to begin to compare labour movements in industrialized societies with those of Latin America. Indeed, such comparisons may help dethrone paradigmatic approaches to labour history *tout court*. Single-country studies often fail to dissect patterns of class formation into their necessary, likely, or contingent forces. The 'exceptionalism' debate in the United States and Germany (whether the United States or Germany should continue to be understood as deviations from the paradigmatic example of the British twins, industrialization and independent labour movement) is now grappling with the challenge to denaturalize the British example.[15] There are no deviant cases because there is no norm, no universal

[13]The variations within the dependency approach are described by William B. Taylor, "Between Global Process and Local Knowledge: An Inquiry into Early Latin American Social History, 1500-1900," in Olivier Zunz, ed., *Reliving the Past: The Worlds of Social History* (Chapel Hill 1985).

[14]This assertion should not obscure the debate on the historical method. See Marc Bloch, "Toward a Comparative History of European Societies," in F.C. Lane, ed., *Enterprise and Secular Change* (Homewood, Ill. 1953); Alette Olin Hill & Boyd H. Hill Jr., "Marc Bloch and Comparative History," *American Historical Review*, 85 (1980); Raymond Grew, "The Case for Comparative Histories," *American Historical Review*, 85 (1980); Jon Elster, *Logic and Society: Contradictions and Possible Worlds* (London 1978), esp. ch. 6.

[15]There is now a massive and very important literature on this issue. See Katznelson's and Zolberg's editoral contributions to their essay collection, *Working Class Formation*. On Germany, see David Blackbourn & Geoff Eley, *The Particularities of German History: Bourgeois Society and Politics in Nineteenth-Century Germany* (Oxford 1985); Eley, "What Produces Fascism: Preindustrial Traditions or a Crisis of a Capitalist State," *Politics and Society*, 12 (1983). On the United States, see Wilentz, "Against Exceptionalism." There is also an important Canadian contribution, focusing on the exceptional militancy displayed by workers in the West. For a recent comment see Bryan Palmer, *Working Class Experience: The Rise and Reconstruction of Canadian Labour* (Toronto 1983); Jeremy Mouat, "The Genesis of Western Exceptionalism: British Columbia's Hard Rock Miners, 1895-1903," *Canadian Historical Review*, LXXI (1990).

covering law of development. Dependency may be a fact of Latin American life, but it is not an insurmountable barrier to comparative studies of, say, North American and Latin American labour history.

The second problem of Bergquist's dependency-comparative approach is substantive, and lies in the origins of dependency theory. Dependency was formalized to explain why Latin America did not develop.[16] As the late 19th-century boom in export-led expansion failed to give way to self-sustained economic growth, and the industrialization of the continent failed to follow the footsteps of Western Europe or the United States, structural economists pointed to the process of unequal exchange between nations as the malefactor in the continent's economic woes. Exploitation of country by country, rather than of social class by social class, explained global patterns of distribution and growth. Dependency also was conceived as a reply to modernization theorists who claimed that the remnants of prebourgeois or precapitalist social forces impeded growth. If anything, it was capitalist trade with the metropole that ensured the survival of sclerotic traditions. Thus neoclassical models of comparative advantage, even if they helped explain accumulation in the centre, could not do so for the periphery.

Dependency theory's critique of modernization and neoclassical trade theories, however, went only part way.[17] By arguing that trade with the developed world stultified growth in the periphery, dependency theorists (of the hard and soft groups) reproduced the image of natural economic growth. Without trade with, or investment in the developed world, normal patterns of accumulation (and class formation) would have been allowed to flourish in Latin America. Development is natural and is the bearer of its own logic. The problem lay in the external interference of the metropole, and the so-called impediments to growth were the new subjects of study. For modernization approaches, this implied the analysis of Latin American personalist, status-seeking agents. For dependency approaches this involved the study of the coercive transfer of wealth out of the region with or

[16]Joseph L. Love, "The Origins of Dependency Analysis," *Journal of Latin American Studies*, 22 (1990); Taylor, "Early Latin American Social History"; Steve J. Stern, "Feudalism, Capitalism, and the World System in the Perspective of Latin America and the Caribbean," *American Historical Review*, 93 (1988). Readers will find in Alexander Gerschenkron an early and perceptive formulation of what dependency and modernisation theories were grappling with: countries which developed differently posed immediate 'backwardness problems.' See "Economic Backwardness in Historical Perspective," in B. Hoselitz, ed., *The Progress of Underdeveloped Countries* (Chicago 1952).

[17]Hence the 'decline' of development economics. Albert O. Hirschman, "The Rise and Decline of Development Economics," in his *Essays in Trespassing: Economics to Politics and Beyond* (New York 1981). Ian Roxborough argues that contending theories of (under)development did not differ much, adding that historians and social scientists should be less concerned to get the 'right' theory and just get on with the job of empirical research. See "Modernisation Theory Revisited," *Comparative Studies in Society and History*, 30 (1988).

without the help of colluding local bourgeoisies. Either way, Latin America was evaluated within an external and linear model of modernization.

How does this pose problems for labour historians? First, it makes dependency (or externally imposed obstacles to growth) the issue which segregates what is comparable: Latin American labour movements can be contrasted among themselves, but because industrialization or development in general is truncated, they cannot be compared to labour movements in Canada, the United States or Europe.[18] Second, the linearity of development implies that the overwhelming force which patterns class formation is class location within a structurally-determined developmental experience. The working class is constituted beyond politics, beyond gender, beyond culture. In Latin America the working classes are constituted by the distorted and truncated nature of their economies which are so because they are dependent. To assign analytical priority to dependency narrows the range of the comparable, and reproduces the teleological models of development which dependency theorists aimed to debunk.

Against Essentialism

ON TWO INTERRELATED COUNTS Bergquist reverts to an essentialist historiographical approach. First, he construes process of class consciousness as an automatic transmission of the objective experience of exploitation in the workplace to a subjective recognition of collective interest in the overthrow of capitalism. When workers do not flock to revolutionary class movements, their 'failure' to measure up to the expectations of historians becomes the subject of analysis (even in the case when a *socialist* consciousness evinced itself as the most powerful in the Americas and one of the most important in the world, as in the case of Argentina before the 1920s). What much of the so-called new social or labour history seeks to explore is the more nuanced, less-automatic connections between experience and consciousness; hence the concern with daily lives. While it may have slipped into the fragmentation and nominalism which Bergquist laments, he exaggerates in his wholesale rejection of recent trends in social history.

Second, Bergquist conceives of development in terms of linear, progressive stages. Societies, especially those having made the transition to market relations, display natural propensities to accumulate capital, invest, industrialize, expand the domestic market, and in short, to develop. This is not just an ahistorical view of the 'West,' as it calls itself, but a wrong one. Moreover, anything, like imperialism, which interrupts the natural flow of history, condemns less-developed countries to

[18]Bergquist is not alone in seeing Latin America as a special case, dependency being the distinguishing force. See Emilia Viotta da Costa, "Experience versus Structures: New Tendencies in the History of Labor and the Working Class in Latin America," *International Labor and Working Class History*, 36 (1989). For an insightful reply to Viotta, see Perry Anderson, "The Common and the Particular," *International Labor and Working Class History*, 36 (1989).

deviate from the norm. The political economy retains prebourgeois or precapitalist traditions because they were not swept away by the forces of a bourgeois revolution. Class formation, and the implications for workers in particular, is structurally determined by its location on the trajectory of development. Social classes are bound by the formation which development or modernization gives them. From their very birth, then, the Latin American working classes were condemned to be neither fully-revolutionary agents (because the underlying industrial economy failed to create a uniform proletarian class), nor participants in stable bourgeois institutions (because the bourgeois class is weakened by its reliance on external support). This all failed to happen in Latin America because from the start the continent was harnessed into the world economic system. Latin American workers, in Bergquist's schema, may be made central historical actors, but their roles were inscribed in a play written before their birth, some time in the mid-16th century.

Judicious use of so-called new social history methods of the so-called developed world can be useful in appraising Latin American labour. Moreover, labour historians in Latin America, North America and Europe should feel freer to compare their studies with one another. Doing so might help bring down the naturalized categories of vulgar Marxism and modernization theories, and help us inch away from historical norms and universal covering laws, whether they are about class consciousness or about economic development.