Handbook The Global History of Work

Edited by
Karin Hofmeester and Marcel van der Linden

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ISBN 978-3-11-042835-3
e-ISBN (PDF) 978-3-11-042458-4
e-ISBN (EPUB) 978-3-11-042470-6

Library of Congress Cataloging-in-Publication Data
A CIP catalog record for this book has been applied for at the Library of Congress.

Bibliographic information published by the Deutsche Nationalbibliothek
The Deutsche Nationalbibliothek lists this publication in the Deutsche Nationalbibliografie; detailed bibliographic data are available on the Internet at http://dnb.dnb.de.

© 2018 Walter de Gruyter GmbH, Berlin/Boston
Cover image: Reciprocal labour: Winnowing rice grains, China c. 1700. Source: Keng-tschi t'u, Ackerbau und Seidengewinnung in China; ein kaiserliches Lehr- und Mahnbuch. Transl. and ed. by Otto Franke (Hamburg, 1913), plate 49, ill. 1.20 Chinese woodblock edition, 1696 , © Walter de Gruyter GmbH.
Printing and binding: CPI books GmbH, Leck
♾ Printed on acid-free paper
Printed in Germany

www.degruyter.com

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Rossana Barragán and David Mayer

2.4. Latin America and the Caribbean

One of the main aspirations of Global Labour History is to include all groups of workers into the historical analysis. Going beyond the classical domain of labour historiography up until the 1990s–(mostly male) industrial factory workers–it has set out to include the history of slaves and other unfree labourers, as well as of self-employed, informal, precarious, unpaid, or subsistence workers, all both male and female. In this regard, research from and about Latin America has played a peculiar 'double role'. On the one hand, it has been a pivotal reference point for the emergence of the field of Global Labour History and for formulating some of its central ideas: the combination of the history of slavery with the study of industrial workers in order to create a reformed *labour history* was experimented with in Brazil much earlier than in other parts of the world and was institutionalized in 2000 with the foundation of *mundos do trabalho,*[1] giving way to one of the most versatile labour historiographies. For a much longer period, researchers from and about Latin America have debated the idea that a commercially oriented production of export goods for the world market–from bullion to crops–can be combined with all kinds of labour relations on the spot: from slavery, *corvée*, and other forms of coerced labour to debt peonage, share cropping, and free wage labour; this assessment was indeed a central issue in the heated controversies around *dependency* which arose in the 1960s.

On the other hand, and as against this role of a vanguard and reference point, labour history from and about Latin America in many cases still functions in very conventional ways, featuring a number of limitations. Firstly, most of the literature still reduces the history of labour to that of industrial workers. Such self-restraint has recently been expressly affirmed by a major proponent in the field.[2] This, however, would mean treating slavery and the multiple other forms of unfree work as the area of specialists and not necessarily labour historians. In addition, it indirectly implies that from a certain moment on, free wage-labour became the only or major form of labour, thus excluding a series of other groups that constitute a substantial part of the active population in Latin America today. Secondly, historical labour research in

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1 *Mundos do trabalho* constituted itself as working group of the Brazilian History Association (Associação Nacional de História, ANPUH). Apart from regular academic gatherings and congresses, since 2009 it publishes an academic journal with the same name.

2 James P. Brennan, "Latin American Labour History", in: Jose C. Moya (ed.), *The Oxford Handbook of Latin American History* (Oxford, 2011), pp. 342–366, at 359–360. Brennan's (by no means unfounded) reservation is that the specific raison d'être of labour history gets diluted if too many other fields (such as rural history, urban history, etc.) are included; in that, he critically replies to an earlier cue by John French who in 2006 explicitly called for a broader temporal and conceptual scope of Latin American labour history: John D. French, "The Labouring and Middle-Class Peoples of Latin America and the Caribbean: Historical Trajectories and New Research Directions", in: Jan Lucassen (ed.), *Global Labour History. A State of the Art* (Bern, 2006), pp. 289–333, at 322–331.

DOI 10.1515/9783110424584-005

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and about Latin America is still mostly national. Again, recently, this has not quite been vindicated, though it has certainly been presented as something that little can be done about.[3] Meanwhile, the lack of comparative studies or transnational approaches is reflected in the relative isolation of researchers vis-à-vis their continental peers: exchanges are often more intense between Latin America and the North Atlantic than among Latin Americans themselves. Similarly compartmentalized along the lines of given polities and their spaces is the lack of comparisons between the different colonial empires (Spanish, Portuguese, Dutch, and British).

In this chapter, we will suggest widening the temporal scope of Latin American labour history (beginning with the subcontinent's colonization in the fifteenth and sixteenth centuries) and including all groups of workers. In the given space, only a general outline can be presented. Several other fields of historical research are involved–such as colonial history, rural history, the history of slavery, economic history, etc.–all with their respective concerns and accumulated, often immense literature. For labour history alone (based on its conventional meaning as the *history of urban industrial workers and their organizations*) a number of bibliographical overviews and interpretative surveys exist on which the following considerations build.[4] While such an approach must necessarily entail a series of gaps and neglect the considerable variations among regions in Latin America for almost any labour relation, our aim is, firstly, to illustrate the wide variety of forms of labour prevalent since colonial times and, secondly, to outline the demarcations and debates of a broadened field of historical labour studies in Latin America.

From the sixteenth to the nineteenth century

Labour systems in colonial Latin America[5] saw a marked geographical and chronological differentiation. Indigenous labour was predominant in the two mainland regions of the Spanish empire, the Mesoamerican region (chiefly what later became Mexico and Guatemala) and the Andean Region (largely today's Ecuador, Peru, and Bolivia). Meanwhile, African slavery was key in Brazil and in the mainland and Caribbean territories seized by the Dutch, the British, and the French.

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3 Peter Winn, "Global Labour History: The Future of the Field?", *International Labor and Working-Class History*, 82 (2012), pp. 85 – 91, at 86 – 88.

4 Wide-angled vantage points of the 'biblioscape' are offered, for instance, by: Brennan, "Latin American Labour History"; French, "Laboring and Middle-Class Peoples of Latin America"; John D. French, "The Latin American Labor Studies Boom", *International Review of Social History*, 45 (2000), pp. 279 – 308.

5 The notion of *Latin America* was introduced only in the 1840s. It was coined in France among a transnational cosmopolitan elite born in Panama, Chile, and Argentina, and living in Paris. The term 'Latin' emphasized their shared history of colonialism, Catholicism, and opposition to Anglo-Saxon North America. See: Michel Gobat, "The Invention of Latin America: A Transnational History of Anti-Imperialism, Democracy and Race", *American Historical Review*, 118, 5 (2013), pp. 1345 – 1375.

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Indigenous Labour

In 1492, the native population of the American Continent is estimated to have been between fifty and sixty million. At least six million people were living in the Aztec Empire, five to ten million in the Mayan states, and eleven million in the Inca Empire. The estimates for Brazil speak of three million people in 1500. This population then served as the main component of the labour regimes established after the Spanish and, to a lesser degree, Portuguese conquests.

These regimes were characterized by comprehensive, albeit varying, mechanisms of coercion. Indigenous forced labour in this early period sometimes took the form of slavery (in Central America and the Caribbean region).[6] Almost simultaneously, the institution of the *encomienda* became the main modality to access the indigenous labour force. The *encomienda* (from *encomendar*, to commission) was awarded to Spanish conquerors and first generation settlers by the Spanish Crown. It delegated a series of duties to these *encomenderos* (christianization of the indigenous population, maintaining order, etc.) and conferred them fundamental privileges, the most important being the labour service of these people (or a tribute in kind). The *encomenderos* depended on the traditional indigenous authorities (*caciques*) to guarantee tribute payments and to channel labour to different economic activities. Although in its early conception the encomienda was relatively short-lived, it nevertheless established some fundamental and recurring mechanisms of labour provision through coercion for the colonial period and beyond, including the intermediating role of indigenous dignitaries and leaders.

The violence of the conquest and the dramatic decline of the population (ninety to ninety-five percent of the population vanished, although the rates varied among the different regions) led the Dominican Friar Bartolomé de las Casas to famously plea for the abolition of the *encomienda* and all compulsory and unpaid labour by the indigenous people. The Spanish Kings subsequently banned the enslavement of the indigenous population (except in war) and issued the New Laws of 1542 that ordered that the natives be considered free and that the owners of the *encomiendas* could no longer demand any unpaid labour services from them. This also represented a power struggle between the Crown and the new colonial elites and in some cases, such as in Peru, even led to armed confrontations.

While from 1560 onwards numerous laws insisted that the Indigenous were free and could only work voluntarily and in exchange for wages, the demand for labour constantly grew with the consolidation of the colonial rule and the intensification of extractive activities in mining. The legal regime of confining the unrestricted exploitation of the local population (which in many regions did not recover from the initial

6 Seymour Drescher, "White Atlantic? The Choice for African Slave Labour in the Plantation Americas", in: David Eltis, Frank D. Lewis, and Kenneth L. Sokoloff (eds), *Slavery in the Development of the Americas* (Cambridge, 2004), pp. 31–69, at 43.

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demographic catastrophe for a long time) was thus offset by a number of mechanisms of labour and tribute exaction. Since the late sixteenth century, the *repartimiento* (distribution) of indigenous labour became the general norm. This was a mandatory, paid labour draft based partially on pre-Hispanic forms of labour tribute. It was designed to last for specific time periods and it began to function for mining, public works, and building and construction activities in the cities. This entailed mobilizing the workforce from the rural communities of the vast territories of the previous pre-Hispanic empires, and it meant that the Spaniards continued to rely on indirect rule, using and recreating much of the traditional governmental structure at the local level.

The main export commodities on the mainland of the continent during almost three centuries were gold and silver. Silver, which entered into a continuous exchange between the Americas, Europe, Asia, and Africa enabled and fuelled the world trade of the epoch. Between 1500 and 1800, eighty percent of the world's silver was produced in Latin America. The two major silver mining centres were Potosí (today Bolivia) and northern central Mexico.

Mining in Potosí was mainly based on indigenous labour. After the Spanish conquest, the extraction process, smelting, casting in wind-blown furnaces (a traditional pre-Hispanic technique called *huayras*), and the sale of the silver in local markets were controlled by the indigenous population. It was a system of sharecropping. After 1570, however, important reforms were introduced. This led to the reorganization of the labour system, resorting to an old Inca system of labour tribute, the *mita* ('turn' or 'work'). This allowed a constant supply of labour, involving an indigenous labour force of 14,000 men per year, who were between eighteen and fifty years of age and recruited from seventeen provinces. The workers, called *mitayos*, went to Potosí with their families and laboured in the mines and mills for a year under the leadership of local indigenous authorities. The *mita* was complemented with another type of labourer, the *mingas*, i.e. persons who were paid by day or week. In fact, both groups overlapped, as the *mitayos* worked for one week out of three and therefore often performed labour as *mingas* during the second and third week.[7]

In contrast, Mexico had multiple silver mining locations in the northern central part of the colony around towns such as Zacatecas, Guanajuato, or Pachuca. When mining first begun, indigenous slaves were used. Over time, in Mexico, silver mining saw a complex and differentiated array of labour relations. On the one hand, there was the large majority of those who were forced to work there, including *indios*,

7 Rossana Barragán Romano, "Dynamics of Continuity and Change: Shifts in Labour Relations in the Potosí Mines (1680–1812)", *International Review of Social History*, 61 (2016), Special Issue 24, pp. 93–114. For Potosí also see the following studies: Peter Bakewell, *Miners of the Red Mountain. Indian Labor in Potosí, 1545–1650* (Albuquerque, NM, 1984); and Jeffrey Cole, *The Potosí Mita, 1573–1700. Compulsory Indian Labor in the Andes* (Stanford, CA, 1985). For later periods, see: Enrique Tandeter, *Coercion and Market. Silver Mining in Colonial Potosí, 1692–1826* (Albuquerque, NM, 1993).

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under the systems of *naboría* (a kind of serfdom) and *repartimiento*, as well as African slaves. On the other hand, there were free wage labourers, a group which varied constantly in size. The wage system included both cash payments and ore-sharing arrangements, called *pepena* or *partido*.[8] The year 1766 gave rise to a severe conflict about the *partido* in the mining town of Real del Monte. This conflict is sometimes considered the first strike in Latin America.[9]

Mining, of course, was not the only non-agrarian productive activity. The urban artisanal sector involved a complex array of workers of different socio-racial status: some trades were the domain of European immigrants and their descendants, others of indigenous artisans; in all trades, unfree labourers of varying origin could be involved. The Spanish Empire also saw the emergence of larger-scale manufacturing in the form of textile workshops (*obrajes*). These were sometimes cited as the first sprouts of an autochthonous Latin American industrialization, yet even in the recent debate about *labour intensive industrialization in global history*, which sets out to discuss alternative paths of industrial development beyond the European 'model', these are seen more as stinted enterprises, limited to the colonial context, than as first, proto-industrial steps.[10] *Obrajes* mainly developed in Puebla and Querétaro (Mexico), Quito (today Ecuador), and Cuzco (today Peru). They included almost all steps of wool cloth manufacturing and involved a heterogeneous mix of labour relations.

The great majority of the population, however, lived in rural areas. Subsistence production, indigenous communal land tenure, and smaller-scale production for local markets existed aside larger rural private estates, owned by Europeans and their descendants. Socio-racial correlations were not automatic, though: Indigenous peasants could produce substantial amounts for markets and larger estates could be limited to subsistence. The character of the latter, the *haciendas*, is a classic controversy of Latin American social history. Depending on the period and the location, the assessment changes from self-contained, autarchic entities representing a feudal, patriarchal order to dynamic, outward-looking capitalist enterprises producing for regional, interregional, or even intercontinental markets.[11]

8 John Monteiro, "Labour Systems", in: Victor Bulmer-Thomas, John H. Coatsworth, and Roberto Cortés Conde (eds), *The Cambridge Economic History of Latin America*. Vol. 1: *The Colonial Era and the Short Nineteenth Century* (Cambridge, 2006), pp. 185 – 234, at 226. On Mexican mining also see: Cuauthémoc Velasco Ávila, "Los trabajadores mineros en la Nueva España, 1750 – 1810", in: Enrique Florescano *et al.*, *La clase obrera en la historia de México*. Vol. 1: *De la colonia al imperio* (México, DF, 1980), pp. 239 – 301.

9 See: Doris M. Ladd, *The Making of a Strike. Mexican Silver Workers' Struggles in Real del Monte 1766 – 1775* (Lincoln, NE, 1988).

10 Colin M. Lewis, "'Colonial' Industry and 'Modern' Manufacturing: Opportunities for Labour-Intensive Growth in Latin America, c. 1800 – 1940", in: Gareth Austin and Kaoru Sugihara (eds), *Labour-Intensive Industrialization in Global History* (London and New York, 2013), pp. 231 – 262, at 233 f.

11 For an overview of these debates see: Eric Van Young, "Rural History", in: Moya, *Oxford Handbook of Latin American History*, pp. 309 – 341, at 312 – 318.

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Understanding the nature of the labour involved was and still is the key issue in this debate. Indeed, the recruitment of labourers was the single most important challenge for these *haciendas* and took the most diverse forms, from traditional claims to labour services and the use of outright coercion, through tenancy and sharecropping arrangements, to the employment of seasonal labour. The conditions of these workers also varied according to the degree to which they were attached to the rural estates as permanent, seasonal, or casual labourers. Those living permanently on the estates had different names in each region, from *gañanes* in Mexico, through *inquilinos* in Chile, to *yanaconas* in the Andes. Many estates adopted a system of tenancy where peasants received a plot of land and had to work on the land of the owners in exchange. The seasonal and casual labourers (in most regions they were known as *peones*) complemented the requirements of the estates. Sometimes, the population decline could push up real wages but in other moments this circumstance led to the increased use of coercion, such as in debt peonage.[12] During the eighteenth century, one instrument to push peasants to work for wages was the so-called *repartos de bienes* y *mercancías*, which forced indigenous communities to buy certain goods at elevated prices from monopoly sellers. While earlier scholarship underlined the coercion and exploitation involved in the *repartos de bienes*, some recent studies reconsidered these to be a form of credit system and thus pointed to the opportunities they offered for articulating the Spanish and the indigenous economies.[13] In any case, coinciding with the prevalence of the *repartos de bienes* (and with a series of economic and political changes introduced by the colonial authorities), at the end of the eighteenth century three major insurrections took place in the Andean Region (associated with the names of Tomás Katari, Túpac Amaru, and Túpac Katari).[14]

Female labourers were directly or indirectly present in almost all of the labour arrangements described. As mentioned, tribute labour often involved many more people than those actually drafted, as women and children temporally migrated as well. In addition, female labour was particularly important in the cities in the domestic services but also in the urban markets: the markets in the Mexican, Guatemalan, and Andean cities were occupied by women.[15]

While indigenous forced labour was fundamental in the early Portuguese colonization of Brazil as well, the Portuguese were not able to build upon a previous im-

12 Monteiro, *Labor Systems*, p. 228.

13 Margarita Menegus (ed.), *El Repartimiento forzoso de mercaderías en México, Perú y Filipinas* (México, DF, 2000).

14 Sinclair Thomson, *We Alone Will Rule. Native Andean Politics in the Age of Insurgency* (Madison, WI, 2002); Sergio Serulnikov, *Revolution in the Andes. The Age of Túpac Amaru* (Durham, NC, 2013); Charles Walker, *The Tupac Amaru Rebellion* (Boston, 2016).

15 Karen Vieira Powers, *Women in the Crucible of Conquest. The Gendered Genesis of Spanish American Society, 1500–1600* (Albuquerque, NM, 2005); Irene Silverblatt, *Moon, Sun, and Witches. Gender Ideologies and Class in Inca and Colonial Peru* (Princeton, NJ, 1987); Susan Socolow, *Women of Colonial Latin America* (Cambridge, 2000).

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perial structure and a territorially integrated system of labour tribute (such as the Spanish in the case of the Aztec and Inca empires). The mobilization of indigenous labour thus took the form of more direct coercion through the systematic capturing of people from the regions of the not-yet-colonized interior, resulting in a marked demographic decline in the indigenous population. Thus, with the beginning of a first sugar boom in the sixteenth century, African slaves became the fundamental workforce of the colony. It should always be born in mind, however, that in certain regions and moments indigenous forced labour continued to play an important role in Brazil during the entire colonial period.

African Slavery in Latin America

By the mid-sixteenth century, the transatlantic slave trade had established itself, with its well-known triangular dynamic of transporting commodities from Europe to Africa, enslaving people from Africa and taking them to the Americas, and transporting commodities from the Americas to Europe. Until 1800, the main centres of slavery were the island Hispaniola, the Brazilian coast, and the non-Spanish Caribbean where slaves worked in the sugar plantations and other export-oriented rural estates. Apart from this plantation slavery, however, slaves were present in all regions of Latin America performing all kinds of work.[16] While the numbers of actual African slaves living in Latin America (including those born there) still remain uncertain estimates, those of the slaves transferred in the middle passage have been approximated ever more precisely in recent research:[17] from 1500 until the final abolition in the second half of the nineteenth century about 12.5 million people were brought to Latin America and the Caribbean from different African regions, a perilous transfer which about 10.7 million survived. Most arrived in Brazil (ca. 4.8 million), while Spanish America received 1.2 million. While 780,000 arrived in Cuba (though the majority of them only in the nineteenth century), Hispaniola, Puerto Rica, and mainland Spanish America also saw considerable numbers in earlier periods. Even in those places where today's socio-cultural imagination does not acknowledge an Afro-American heritage (e.g. in Chile, the Rio de la Plata cities, and Mexico City), the presence of slaves was considerable.

16 A general overview of the development of African slavery in all regions of Latin America is offered in: Herbert Klein and Ben Vinson III, *African Slavery in Latin America and the Caribbean* (New York, 2007). For its origin and establishing see chapters 1 and 2.

17 To a high degree, this improvement was possible thanks to "Voyages: The Trans-Atlantic Slave Trade Database" (www.slavevoyages.org), a multi-institutional research cooperation which, from 2006, brought together many previous and ongoing endeavours in establishing numbers of slaves deported in the transatlantic slave trade. Numbers mentioned here are based on the tables available on the website.

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In the regions of the Spanish Empire, the labour demand for African slaves grew in intensity from the last decades of the sixteenth century. This was due in part to the decline of the indigenous population but also to support some specific segments of the Spanish economy. African slaves and free blacks played a crucial role on estates that produced sugar (e.g. in Veracruz, Mexico), wine (in Peru on the Pacific coast), and wheat, in some of the silver and gold mines (e.g. in Barbacoas and Chocó, now in Colombia), in the above-mentioned *obrajes*, in urban domestic services (particularly in the big cities like Mexico, Lima, and Buenos Aires), in different specialized crafts, and in the shipbuilding industry.[18] In Brazil, slaves could also be found in activities other than plantation labour, from agriculture, cattle-breeding, or other food production to domestic services, crafts, or all kinds of transport labour, both on the coast and in the interior. A special variant of slavery in Brazil were the *escravos de ganho* (wage-earning slaves), who were ordered by their owners to seek wage labour (often at ports) and had to hand over a certain part of their earnings to them.[19] However, the majority of slaves in Brazil–as well as in those Spanish regions and Caribbean possessions by other powers where slave labour was the very foundation of the coastal or insular plantation economy–were put to work in often extremely arduous agricultural field labour. High mortality rates and constant resistance through flight and other activities testify to the hyper-exploitative character of this labour.

Although the first commercial sugarcane *ingenios* (cane plantations plus mills where the sugar cane was processed into exportable molasses or raw sugar) in the Americas were founded on the then Spanish island of Hispaniola (today Haiti and the Dominican Republic), it was Brazil's Northeast which emerged as the major centre of a slave-based sugar-plantation economy.[20] By 1600, more than sixty *engenhos* could be found in Pernambuco and around fourty in Bahia. These were complemented by smaller *lavradores de cana* that operated on smaller fields without mills and

18 Monteiro, *Labor Systems*, p. 208. For an example of the complicated coexistence of slavery and wage-labour in urban artisanal production, see: Lyman L. Johnson, "The Competition of Slave and Free Labor in Artisanal Production: Buenos Aires, 1770–1815", in: Tom Brass and Marcel van der Linden (eds), *Free and Unfree Labour: The Debate Continues* (Bern, 1997), pp. 265–280.

19 On labour and lives of urban slaves in Brazil, including the *escravos de ganho*, see for instance: Mary C. Karasch, *Slave Life in Rio de Janeiro, 1808–1850* (Princeton, NJ, 1987). On the wage-earning slaves' role in nineteenth-century urban contentiousness see: João José Reis, "'The Revolution of the Ganhadores': Urban Labour, Ethnicity and the African Strike of 1857 in Bahia, Brazil", *Journal of Latin American Studies*, 29 (1997), pp. 355–393.

20 Christopher Ebert, *Between Empires. Brazilian Sugar in the Early Atlantic Economy, 1550–1630* (Leiden and Boston, 2008); Daniel Strum, *The Sugar Trade: Brazil, Portugal and the Netherlands (1595–1630)* (Stanford, CA, 2013); Mary Eschberger Priante, *Escravos, mãos e pés do senhor de engenho. Economia açucareira no período colonial do Brasil* (Porto Alegre, 2004).

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with less slaves. Together, these accounted for two thirds of the sugar produced in the Americas at the time.[21]

In the mid-seventeenth century, the centre of sugar-cane production began to shift again towards the Caribbean, where other European powers increasingly held possessions and introduced sugar plantations, most famously the French in the colony of Saint Domingue (the western part of the island Hispaniola). Meanwhile, the relative decline of slave-based sugar production in Brazil's Northeast was offset by a gold (and, to a lesser degree, diamond) boom in the centre and south of the country.[22] These changes and the constant influx of African slaves meant that by 1800 Brazil not only had the largest slave population in the Americas, it also saw the broadest diversity of the use of slave labour in both rural and urban activities. This, together with the considerable number of freed slaves and free-born Afro-Brazilians, gave rise to a variegated socio-racial constellation in Brazilian society.

In the Spanish Empire, the slave trade, which previously had been regulated through licenses and monopolies, was liberalized in 1789, resulting in the development of new centres of slave-based production in several regions: in Chocó (today Colombia) in the production of gold, in Venezuela in cacao, and in Puerto Rico and Cuba in coffee and, above all, sugar.[23] It was especially Cuba which experienced its heyday of a slave-based plantation economy only in the nineteenth century–a period in which both slave trade and slavery are supposed to have seen a decline and disappearance.

The decline of slavery as a social institution in the Americas and the beginning of the abolition of, first, slave trade (starting in 1807) and then of slavery itself, was protracted. Multiple factors influenced it, ranging from ideological (the emergence of a humanist abolition movement in Europe and the proliferation of Republican ideals after the French Revolution) through geopolitical (Latin American independence movements and the imposition of British hegemony over the Atlantic) to economic factors (the 'viability' of slave-based plantation complexes).[24] From a labour history point of view, however, it is important to stress that Afro-American slaves themselves played a major role in this process. It was initiated by a successful slave revolution

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21 Klein and Vinson, *African Slavery in Latin America and the Caribbean*, p. 44. For a comparative view about slavery in Brazil, Cuba, and the United States, see: Laird W. Bergad, *The Comparative Histories of Slavery in Brazil, Cuba, and the United States* (Cambridge, 2007).

22 Klein and Vinson, *African Slavery in Latin America and the Caribbean*, pp. 53–57, 65–66. On gold mining, see: Kathleen J. Higgins, *'Licentious Liberty' in a Brazilian Gold-Mining Region. Slavery, Gender, and Social Control in Eighteenth-Century Sabara, Minas Gerais* (University Park, PA, 1999).

23 See the classical study of Manuel Moreno Fraginals, *The Sugarmill. The Socioeconomic Complex of Sugar in Cuba 1760–1860* (New York, 1976 [Spanish original: 1964]). Another classic on Caribbean sugar cultivation remains: Sidney Mintz, *Sweetness and Power. The Place of Sugar in Modern History* (New York, 1985).

24 Robin Blackburn, *The Overthrow of Colonial Slavery, 1776–1848* (London, 1988); Seymour Drescher, *From Slavery to Freedom. Comparative Studies in the Rise and Fall of Atlantic Slavery* (New York, 1999).

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in Saint Domingue in 1791 (resulting in its independence as Haiti in 1804), which can be considered the most radical appropriation of the ideas promulgated during the French Revolution–an appropriation by a group of workers who had clearly not been addressed by these ideas. That event, its inspirational impact (on other slaves in the Americas) as well as provocation of fear (among the slave owners) had a large effect on the Latin American independence movement and on American politics until the last quarter of the nineteenth century. While slavery was successively abolished during the first half of the nineteenth century in most mainland Latin American countries and on numerous Caribbean islands, it was maintained in the USA, Puerto Rico, Cuba, and Brazil, leading to a marked increase in the number of slaves and a boom in slave-based plantation production in these countries. In the words of Ada Ferrer: "Slavery's expansion here must be viewed as part and parcel with its decline elsewhere."[25]

The boom of slavery and the related export commodities sugar (Cuba) and coffee (Brazil) in the age of slavery's 'official' decline has been the object of long scholarly debates. It led Dale Tomich to coin the term *second slavery* for the nineteenth century and to point to its central role in the development of (industrial) capitalism.[26] Contrary to older notions that slavery went into decline for purely economic reasons–because of its retrograde dependence on unrestrained exploitation and its supposed incompatibility with the maxims of capitalist profit maximization (investment in new technology, constant improvement of efficiency and the labour process, etc.)–more recent research has shown that ninteenth century slavery in the mentioned countries could go along with major technological improvements and efficiency-oriented procedures. This is true, for instance, in the case of the Cuban sugar industry, which by 1870 was producing around fourty percent of world output: in 1838 the first railroads were introduced in the rural areas, reducing transport costs and freeing large numbers of slaves from transport occupations. Also, steam-driven mills replaced animal powered processing, thus reorganizing sugar production in rural Cuba around the *centrales*, large factories in the field. These handed over sugar planting proper to smaller independent planters.[27]

Abolition came late in Cuba (1886) and was softened (for the slave owners) by an array of transitionary provisions (such as a long apprenticeships contracts, a de facto prolongation of unfreedom).[28] From the mid-nineteenth century on, the successive

25 Ada Ferrer, "Cuban Slavery And Atlantic Antislavery", in: Josep M. Fradera and Christopher Schmidt Nowara (eds), *Slavery and Antislavery in Spain's Atlantic Empire* (New York, 2013), pp. 134–156, at 136.

26 Dale Tomich and Michael Zeuske, "Introduction. The Second Slavery: Mass Slavery, World-Economy, and Comparative Microhistories", *Review. A Journal of the Fernand Braudel Center,* 31 (2008), pp. 91–100.

27 Klein and Vinson, *African Slavery in Latin America and the Caribbean*, pp. 91–93.

28 Rebecca J. Scott, *Slave Emancipation in Cuba. The Transition to Free Labor, 1860–1899* (Pittsburgh, PA, 1985).

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international enforcement of the abolition of slave trade (including its trafficking form) and the constant acts of resistance from the slaves themselves as well as the considerable numbers of a free and/or manumitted Afro-Caribbean population led to attempts to complement or replace the slave population by other labourers, most prominently Chinese coolies.

In Brazil, second slavery also meant a geographical shift: the boom of coffee production in the southeast of the country led to a major internal slave trade. Abolition was a protracted process in Brazil as well, leading from the Free Womb Act in 1871 to the famous *Lei Áurea* (Golden Law) of 1888. The open resistance of slaves which was manifested by them fleeing the coffee plantations (which took the form of a mass-movement shortly before abolition) played a major role.[29]

The gamut of resistance by slaves in Latin America was broad and these acts started long before the combined effect of the Haitian Revolution and abolitionism offered a clear perspective for actually ending slavery. One fundamental act of defiance was flight. These *cimarrones* (maroons) would flee to inaccessible areas, often joining indigenous communities. Depending on proper geographical conditions, *cimarrones* were able to constitute stable communities (*quilombos*, *palenques*), in some cases even larger polities, such as the Quilombo dos Palmares in Brasil (crushed in 1695 by a colonial army), the Palenque de San Basilio in Colombia, or the *cimarrones* of Esmeraldas in Ecuador.[30]

Debates

Latin America and the Caribbean in colonial times and their variegated labour regimes have played a central role in a number of historiographic debates. Although these debates have mostly revolved around issues such as slavery or rural history, they have also included macro-controversies about the emergence and character of capitalism. As far as slavery is concerned, to a high degree the stakes still (or again) hinge upon *Capitalism and Slavery*, published in 1944 by the Jamaican historian Eric Williams which put forward the idea of a close nexus between the triangle trade, slave-based plantation economies, and the industrial revolution in Britain (resp. the capital accumulation needed to launch it). Another debate arose about Eric William's notion that slavery went into economic decline because of decreasing

29 Emília Viotti da Costa, *Abolition. From Slavery to Free Labour* (São Paulo, 2013 [orig. in Portuguese 1982]). For the intricacies of protracted abolition and the role of slave resistance, see: Sidney Chalhoub, "The Politics of Ambiguity: Conditional Manumission, Labor Contracts, and Slave Emancipation in Brazil (1850s-1888)", *International Review of Social History*, 60, 2 (August 2015), pp. 161 – 191.
30 See: Robert Nelson Anderson, "The 'Quilombo' of Palmares. A New Overview of a Maroon State in Seventeenth-century Brazil", *Journal of Latin American Studies*, 28, 3 (October 1996), pp. 545 – 566; Richard Price (ed.), *Maroon Societies. Rebel Slave Communities in the Americas* (Baltimore and London, 1979, 2nd edn).

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profitability and 'backwardness'. A long list of research has instead stressed the peculiar modernity of slavery, especially where it continued in the nineteenth century (US South, Cuba, and Brazil), and its profitability and compatibility with modern technology and improved management methods.[31]

In the 1960s, Latin America saw the emergence of *dependency theory* (one of the few cases in which a major social science paradigm originated in the Global South). Despite its many variants, most of its proponents shared the idea that since its colonization Latin America was integrated into an emerging global market. This entailed a division of labour between world-regions which was characterized by the drive for capital accumulation, unequal exchange, and monopolies (imposed through the violence of colonial domination).[32] Labour relations in Latin America, whatever their form and mode, thus had to be analysed in terms of the essentially capitalist nature of the exchange between Latin America and Europe. Later *world-system analysis*, in many ways an extension and continuation of the dependency school, shared this fundamental notion of the compatibility of coercive, bonded, or enslaved labour with capitalism. Less well-known is the Latin American *mode of production* debate of the 1970s, which emerged as a critique of dependency currents and which tried to offer a more tiered and layered panorama of the interrelation of local labour regimes and commercial export dynamics.[33] Some proponents, such as Carlos S. Assadourian, also pointed to the notable (and geographically extended) internal dynamics of Latin American colonial economies, which enabled and catered for the mining complexes such as in Potosí. They proposed the existence of several modes of production in colonial Latin America, each based on specific forms of labour that were interrelated through so-called articulation.

More recently, a debate (in this necessarily extremely selective list of controversies) emerged in the context of historical institutional perspectives and their interest in *factor endowments*. As Acemoglu, Johnson, and Robinson saw it in their famous book *Why nations fail*,[34] colonialism in Latin America was fundamentally extractive

31 Selwyn H.H. Carrington and Seymour Dresher, "Debate: Econocide and West Indian Decline, 1738 – 1806", *Boletín de Estudios Latinoamericanos y del Caribe*, 36 (June 1984), pp. 13 – 67; David Brion Davis, "Reflections on Abolitionism and Ideological Hegemony", *American Historical Review*, 92, 4 (1987), pp. 797 – 812; Thomas Bender (ed.), *The Antislavery Debate: Capitalism and Abolitionism as a Problem in Historical Interpret*ation (Berkeley, CA, 1992); Selwyn H.H. Carrington, "Capitalism & Slavery and Caribbean Historiography: An Evaluation", *The Journal of African American History*, 88, 3 (2003), pp. 304 – 312.

32 For the whole gamut of the debates, see: Cristóbal Kay, *Latin American Theories of Development and Underdevelopment* (London, 1989).

33 Carlos Sempat Assadourian *et al.*, *Modos de producción en América Latina* (Buenos Aires, 1973). Also see: Steve J. Stern, "Feudalism, Capitalism, and the World-System in the Perspective of Latin America and the Caribbean", *American Historical Review*, 93, 4 (October 1988), pp. 829 – 872.

34 Daron Acemoglu and James Robinson, *Why Nations Fail. The Origins of Power, Prosperity, and Poverty* (New York, 2012). See also Daron Acemoglu, Simon Johnson, and James Robinson, "The Colonial Origins of Comparative Development: An Empirical Investigation", *American Economic Review*, 91, 5

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(not least by exacting labour through coercion and slavery), giving rise to equally predatory institutions and, finally, to today's societies which are among the most unequal in the world. Contrary to that, colonialism in North America is presented as much more liberal, as accountable institutions, smallholding, free markets, etc. existed. While nobody would deny that Latin America still bears the marks of colonialism (not least in its labour relations), the particular opposition between the North and the South has been criticized as reductionist. It not only omits many of the complex nuances of economic and political arrangements in Latin America, it also ignores the important legacy of coercive practices in the North American colonies, from the marginalization of the indigenous population to the widespread use of indentured and slave labour.[35]

The long twentieth century

Agrarian Labour

The social and occupational trajectories of former slaves in Latin America and the Caribbean since the last decades of the nineteenth century constitute a proper field of research. The situation of the Afro-descendant population has seen both general trends–continued marginality and the social precarity of newly achieved freedom–as well many regional and sectional variations. Former slaves continued to work in sugar or coffee plantations as (often indebted) day labourers, moved towards subsistence agriculture, smallholding, or sharecropping, joined the marginal sectors of the urban working class, or became active in the (up until today) huge zone in which self-employment, informal work, and bare survival intersect.[36]

As mentioned, planters and public authorities had sought new ways to deploy workers on the plantations—even before the official end of slavery. In many regions, Asian coolies were recruited as replacement. While Indians were brought to British, French, and Dutch possessions in the circum-Caribbean, Chinese workers arrived

(December 2001), pp. 1369 – 1401, and Stanley Engerman and Kenneth Sokoloff, "Factor Endowments, Institutions, and Differential Paths of Growth Among New World Economies", in: Stephan Haber (ed.), *How Latin America Fell Behind* (Stanford, CA, 1997), pp. 260 – 304.

35 Regina Grafe and María Alejandra Irigoin, "The Spanish Empire and its Legacy: Fiscal Re-Distribution and Political Conflict in Colonial and Post-Colonial Spanish America", *Journal of Global History*, 1, 2 (2006), pp. 241 – 267; Gareth Austin, "The 'Reversal of Fortunes' and the Compression of History: Perspectives from African and Comparative Economic History", *Journal of International Development*, 20, 8 (2008), pp. 996 – 1027; John Coatsworth, "Structures, Endowments, and Institutions in the Economic History of Latin America", *Latin American Research Review*, 40, 3 (2005), pp. 126 – 144.

36 A graphic analysis of the situation in Cuba is offered in: Rebecca J. Scott and Michael Zeuske, "Property in Writing, Property on the Ground: Pigs, Horses, Land, and Citizenship in the Aftermath of Slavery, Cuba, 1880 – 1909", *Comparative Studies in Society and History*, 44, 4 (2002), pp. 669 – 699.

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in substantial numbers in Cuba, Peru, Mexico, and Brazil.[37] In most cases, these workers were indentured and thus vulnerable to abuses and overexploitation, though their unfreedom and marginalization was not comparable to African-American slaves. In a later wave, from the 1900s on, Cuba and other locations also saw the massive recruitment of Afro-Caribbean workers from Haiti, Jamaica, etc. for work in cash-crop cultivation but also for large infrastructure works (railways etc.).[38] In other parts of Latin America, the demand for labour was met by European immigrants, especially in the cases of Brazil and Argentina. While Europeans in Brazil were meant to replace African slaves on coffee plantations, the migrants in Argentina were needed for the expanding agrarian sector (especially extensive cattle ranching) and the booming port cities. Argentina offered exceptionally high wages compared to the migrants's wages in their regions of origin (up to 200 % higher than in Southern Europe, especially Italy and Spain, and Eastern Europe). The incentive for Europeans to become *colonos* on the coffee plantations in Brazil were less the wages but more the subsidized character of migration (including transport fees, housing, garden plots, etc.). In total, some 13 million Europeans arrived in Latin America from 1870 to 1930, though a remarkably high proportion of these migrants returned at some point or even migrated back and forth in regular, seasonal cycles (called *golondrinas*, birds of passage, in Argentina).[39]

While the previous existence of substantial slave labour can be seen as synonymous with an export-oriented cash-crop production in certain concentrated regions, it is important to bear in mind that the whole of Latin America experienced a boom in export-commodity production from the last third of the nineteenth century onwards. This forceful boom–the term *second conquest* has been used to describe it–included commodities from sugar, coffee, cacao, and bananas to guano, nitrate, rubber, henequen, and oil.[40] It affected both regions already connected to the world market as well as new ones. In that sense, Latin America can serve as a perfect example for the emerging research interest in *commodity frontiers*, i. e. the incorporation of agrarian areas into the domain of world-market production and the ensuing ecological pressures as well as challenges of mobilizing workers for this produc-

37 Madhavi Kale, *Fragments of Empire. Capital, Slavery, and Indian Indentured Labor in the British Caribbean* (Philadelphia, PA, 1988); Lisa Yun, *The Coolie Speaks. Chinese Indentured Laborers and African Slaves in Cuba* (Philadelphia, PA, 2008); Walton Look Lai and Tan Chee-Beng (eds), *The Chinese in Latin America and the Caribbean* (Leiden and Boston, 2010).

38 For an important 'debate opener' in this regard, see: Aviva Chomsky, *West Indian Workers and the United Fruit Company in Costa Rica, 1870–1940* (Baton Rouge, LA, 1994).

39 Blanca Sánchez Alonso, "Labour and Immigration", in: Bulmer-Thomas, Coatsworth, and Cortés Conde, *Cambridge Economic History of Latin America*. Vol. 2, pp. 377–426, at 382–386.

40 See: Stephen Topik (ed.), *The Second Conquest of Latin America. Coffee, Henequen, and Oil during the Export Boom, 1850–1930* (Austin, TX, 1998).

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tion.[41] In South America, this also involved a massive and often genocidal expansion of the postcolonial states into territories still inhabited by indigenous peoples, such as in Chile and Argentina towards the south or in Brazil towards the Amazon region.[42] The commodity boom generally went along with political regimes that combined liberal economic policies with a repressive order and laid the foundations for the so-called *desarrollo hacia afuera* (outward-oriented development model) which lasted until Great Depression of the 1930s.

The export-oriented commodity boom involved numerous rearrangements in rural labour relations, not least in those former Spanish mainland countries in which a local indigenous or *mestizo* population constituted the majority. This meant, above all, a grand encroachment on the relatively broad base of communal and/or subsistence agriculture. While these processes took a great variety of forms and names and often continued to use colonial legal concepts and 'traditional' cultural forms, the most widespread generic labour relations in this sphere were, on the one hand, modes of giving access to land in exchange for labour on larger estates and, on the other, *debt peonage*, i.e. labour enforced through a system of advances and the ensuing state of accumulated debt. Regional and temporal specificities here abound (sometimes even working to the peasants's advantage), yet prototypical cases, such as Guatemala, point to the way debt peonage was entangled with racialized political ideologies (which denigrated anything *indio*) and repressive legal instruments, like anti-vagrancy laws, to create a general social surrounding that ensured a non-free agrarian labour force.[43] The well-known model of a fundamentally unequal and exploitative agrarian world consisting of great commercial estates (*latifundia*) lording over marginal smallholdings (*minifundia*) might be too simplistic for many empirical cases, yet its heuristic power for understanding the subcontinent *en gros* equally remains remarkable. It also constitutes the background for the fact that, during the twentieth century, Latin America became one of the world's most urbanized world-regions.

Peasant movements or outright revolts thus unsurprisingly constitute an important part of these worlds of agrarian labour. The many instances of mobilizations, however, have rarely been studied in an interregional and comparative way (either diachronically or synchronically).[44] Latin America has also seen important attempts

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41 A notion coined by Jason W. Moore, see: Jason W. Moore, "Sugar and the Expansion of the Early Modern World-Economy: Commodity Frontiers, Ecological Transformation, and Industrialization", *Review. A Journal of the Fernand Braudel Center*, 23, 3 (2000), pp. 409–433.

42 For a social-historical emphasis among the extensive literature on this process in the Argentinian case, see for instance: Osvaldo Barsky and Jorge Gelman, *Historia del agro argentino. Desde la conquista hasta fines del siglo XX* (Buenos Aires, 2001), ch. V.

43 See: David McCreery, "Debt Servitude in Rural Guatemala, 1876–1936", *The Hispanic American Historical Review*, 63, 4 (1983), pp. 735–759.

44 For broader or comparative approaches, see for instance: Friedrich Katz (ed.), *Riot, Rebellion, and Revolution. Rural Social Conflict in Mexico* (Princeton, NJ, 1988); Pablo González Casanova (ed.), *Historia política de los campesinos latinoamericanos.* 4 vols (México, DF, 1984–1985); Henry Veltmeyer,

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at agrarian reform, the most important being related to revolutionary upheavals: the reforms in Mexico in the 1930s which established a singularly modern form of *ejido* (communal land ownership) and which were a product of the gigantic agrarian mobilizations during the Mexican Revolution between 1910 and 1917, the Cuban Revolution of 1959, the Bolivian Revolution of 1952, and the attempts at agrarian reform launched in Chile under the *Unidad Popular* government (1970 – 1973). Up until today, some Latin American rural social movements rank among the internationally most iconic, such as the *Movimento dos Trabalhadores Sem Terra* (MST) (the landless labourers's movement) in Brazil, the *Neo-Zapatistas* in Mexican Chiapas, or the *Cocalero* movement in Bolivia. While in the case of the first, the 'socialist' and 'labour' identity has been at the forefront, in the latter two, the movements present themselves (or are generally perceived) in terms of their indigenous identity and the ensuing claims and aspirations.

The urban mélange

Since colonial times, urban spaces Latin America have seen a motley coexistence of different labour relations (from slavery through other unfree relations to free wage labour) and workers of all socio-racial status positions. This is especially true for the large port cities, such as Havanna, Veracruz, Lima, Buenos Aires, or Rio de Janeiro. The spaces where these labour activities have been taking place not only included workshops, offices, stores, the street, and public places, but also households, especially the residences of well-to-do-families. As mentioned, women have been very present both in households[45] and in markets. Urban plebeian groups consequently played an important role during the *independencia* struggles and were also able to intervene and secure claims in the post-colonial political constellations.[46] A series of studies have pointed out that, during the nineteenth century,

"La dinámica de las ocupaciones de tierras en América Latina", in: Sam Moyo and Paris Yeros (eds), *Recuperando la tierra. El resurgimiento de movimientos rurales en África, Asia y América Latina* (Buenos Aires, 2008), pp. 301 – 333; León Zamosc, Estala Martínez, and Manuel Chiriboga (eds), *Estructuras agrarias y movimientos campesinos en América latina, 1950 – 1990* (Madrid, 1997).

45 The history and present situation of domestic work in Latin America is a field of research of its own. Important cues since the 1990s can be found in: Elsa M. Chaney and Mary Garcia Castro (eds), *Muchachas No More: Household Workers in Latin America and the Caribbean* (Philadelphia, PA, 1989); Sandra Lauderdale Graham, *House and Street. The Domestic World of Servants and Masters in Nineteenth-Century Rio de Janeiro* (Austin, TX, 1992); Elizabeth Hutchison, *Labors Appropriate to Their Sex. Gender, Labor and Politics in Urban Chile, 1900 – 1930 (*Durham, NC, 2001); Ann S. Blum, *Domestic Economies. Family, Work, and Welfare in Mexico City, 1884 – 1943* (Lincoln, NE, 2009).

46 It was especially in Argentina, resp. Buenos Aires, that independence happened as an outspokenly urban affair. For recent research, see: Lyman L. Johnson, *Workshop of Revolution. Plebeian Buenos Aires and the Atlantic World, 1776 – 1810* (Durham, NC, 2011); Gabriel Marco Di Meglio, *¡Viva el*

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different groups of workers continued to co-exist in Latin American cities (especially where slavery was in place until late) and that, in this period, the urban working population experienced profound shifts in terms of race (end of slave trade, beginning of European immigration) and gender (for instance, the displacement of women from their previously strong presence in retail).[47]

The formation of an urban industrial working class in Latin America took place later than in the North Atlantic and was embedded in the complicated occupational and social mélange mentioned. While classical labour history tended to focus on the formational element, more recent studies highlight the intermixture. Re-readings here are possible: for instance, Luis Alberto Romero's and Mirta Lobato's by now classic study of the working class formation in nineteenth-century Buenos Aires was, at the time of its publication, seen as an affirmation of the vanguard role of Buenos Aires in constituting the first fully free wage-labour society in Latin America;[48] in the light of current debates, however, its power lies more in showing how fluid the boundaries between day labour, petty commercial activities, (often makeshift) self-employment, domestic labour, productive activities within the household (e.g. in dressmaking), etc. were.

Cities also witnessed the most intense attempts by governments and local authorities to control and discipline the lower classes according to contemporary ideas of a modern, well-ordered city. Popular dwellings, street vending, day labouring at the harbour, the public presence and work of women, etc. could be subject to persecution based on laws and decrees against 'vagrancy' or 'prostitution'.[49]

During the twentieth century, Latin American cities, much like their North-Atlantic counterparts, became the focal point of industrial development, working class culture, the formation of unions, and labour-related political organizations, as well as state-policies benefitting these groups. Beyond this 'convergent' development, how-

bajo pueblo! La plebe urbana de Buenos Aires y la política entre la Revolución de Mayo y el rosismo (1810 – 1829) (Buenos Aires, 2016, 4th extended edn).

47 For artisanal workers in nineteenth-century cities in Mexico, see: Carlos Illades, *Estudios sobre el artesanado urbano del siglo XIX* (México, DF, 2001). For the manifold shifts among urban labourers in Rio de Janeiro see: Fabiane Popinigis and Henrique Espada Lima, "Maids and Clerks, and the Shifting Landscape of Labor Relations in Rio de Janeiro (1830s–1880s)", *International Review of Social History*, 62 (2017), Special Issue 25 [in print]. For political intersections or even interactions see: Marcelo Badaró Mattos, "Experiences in Common: Slavery and 'Freedom' in the Process of Rio de Janeiro's Working-Class Formation (1850 – 1910)", *International Review of Social History*, 55 (2010), pp. 193 – 213; Joan Casanovas, "Slavery, the Labour Movement and Spanish Colonialism (1850 – 1898)", in: Brass and van der Linden, *Free and Unfree Labour*, pp. 249 – 264.

48 Luis Alberto Romero and Hilda Sabato, *Los trabajadores de Buenos Aires. La experiencia del mercado, 1850 – 1880* (Buenos Aires, 1992).

49 For the case of Rio de Janeiro, see for instance: Lerice de Castro Garzoni, "At the Borders of Non-Work: Poor Female Workers and Definitions of Vagrancy in Early Twentieth-Century Rio de Janeiro", *International Review of Social History*, 60, 2 (2015), pp. 193 – 224; Cristiana Schettini, *'Que Tenhas Teu Corpo': uma historia social da prostituçao no Rio de Janeiro das primeiras décadas republicanas* (Rio de Janeiro, 2006).

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ever, Latin American cities also 'diverged' as they spectacularly grew in size, receiving millions of internal migrants from the countryside who could not be absorbed by the urban labour markets and who swelled extensive irregular dwellings (*favelas*, *villas*, *barrios de miseria*, etc.). Its inhabitants have, especially since the second half of the twentieth century, accounted for a major part of the workforce in Latin American cities, moving with their labour in the difficult-to-define zone which is demarcated by day labouring, domestic services and care work in better-off households, precarious self-employment, criminal activities, or bare survival. They constitute what has been discussed since the 1960s as the *informal sector*, i. e. all economic activities outside of state regulation.[50] The debate about the informal sector has grown to fill libraries and offers many stimulating insights for labour historians. Still, expressly historiographical studies about the phenomenon remain relatively rare (though many anthropological studies include historical viewpoints). From a Global Labour History point of view, meanwhile, it seems important not to erect too rigid a distinction between 'formal' and 'informal' work, to point to the close interconnections between them (not only economically but also in relation to the persons and households involved), and to stress the historical continuities of the experience of urban precarity.

Industrial labour

The export oriented commodity production boom since the last third of the nineteenth century not only involved agricultural production but also instigated processes of industrial development in some regions. This was especially the case in Argentina, Chile, southern Brazil, and Mexico. The two main sectors of non-agrarian production since colonial times–mining and textiles–continued to be dominant,[51] complemented by new sectors such as food processing (canning, meat packing, etc.).

As mentioned, since the 1880s, the previous, often artisanal urban working classes sharply expanded through the arrival of European immigrants. The latter brought their political traditions with them, and soon mutual aid organizations, unions, and political groups emerged, ushering in the formation of a social group

50 For a recent overview, see: Alejandro Portes and William Haller, *La economía informal* (Santiago de Chile, 2014), available under: <http://www.cepal.org/es/publicaciones/6091-la-economia-informal>.

51 For a general overview of mining in Latin America in postcolonial states, see: Kendall W. Brown, *A History of Mining in Latin America. From the Colonial Era to the Present* (Albuquerque, NM, 2012), chs 5 and 6. On nitrate mining in Chile see: Julio Pinto, *Trabajos y rebeldías en la pampa salitrera. El ciclo del salitre y la reconfiguración de las identidades populares (1850–1900)* (Santiago de Chile, 1998). On early textile industries in Mexico see: Mario Trujillo Bodio, *Operarios fabriles en el Valle de México (1864–1884). Espacio, trabajo, protesta y cultura obrera* (México, DF, 1997). Also see the general overviews offered on Argentina, Brazil, Mexico, and Uruguay in: Lex Heerma van Voss, Els Hiemstra-Kuperus, and Elise van Nederveen Meerkerk (eds), *The Ashgate companion to the history of textile workers, 1650–2000* (Farnham, 2010).

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which saw itself as part of a modern proletariat. While until World War I different currents of anarchism and, later, anarcho-syndicalism remained dominant, Latin America also saw a very early reception of Marx and Marxism (in Argentina since the 1870s) as well as socialist ideas.[52] Before World War I, a series of fundamental organizations such as the *Casa del Obrero Mundial* (COM) in Mexico, the *Federación Obrera Regional Argentina* (FORA), the *Socialist Party* (Argentina), and the *Partido Obrero Socialista* (Chile) had been established. Recently, research on these early working classes has gone beyond the mere reconstruction of political or ideological developments, focusing instead on the wider milieus, the everyday life components of political militancy,[53] and the transnational connections in the labour and political lives of these workers.[54]

Labour history as a field of enquiry unsurprisingly first emerged in Latin America out of the movements themselves; this historiography almost exclusively studied the political and ideological history of organizations.[55] Since the interwar period, Latin American labour also caught the attention of researchers from the North-Atlantic region. These often enough used highly problematic lenses when looking at phenomena which refused to follow Northern models. In the post-war period, a strong Anglophone research tradition emerged, which reflected varying intellectual and political concerns: from Robert J. Alexander's studies of political and labour organizations (deeply embedded in the cold war binary)[56] through Hobart Spalding's and Charles Bergquist's strongly comparative works[57] to the dynamic boom in labour history studies about Latin America since the 1980s, associated with historians such as Daniel James, John French, James Brennan, Peter Winn, Barbara Weinstein, etc. The

52 Horacio Tarcus, *Marx en la Argentina. Sus primeros lectores obreros, intelectuales y científicos* (Buenos Aires, 2007).

53 On Argentina, see for instance: Juan Suriano, *Paradoxes of Utopia. Anarchist Culture and Politics in Buenos Aires, 1890–1910* (Oakland, CA, 2010); Lucas Poy, *Los orígenes de la clase obrera argentina: huelgas, sociedades de resistencia y militancia política en Buenos Aires, 1888–1896* (Buenos Aires, 2014).

54 See the contributions on Anarchists in Peru, Argentina, Brazil as well as in the labour and political circuits between the Caribbean, Mexico, and the USA in: Steven Hirsch and Lucien van der Walt (eds), *Anarchism and Syndicalism in the Colonial and Postcolonial World, 1870–1940. The Praxis of National Liberation, Internationalism, and Social Revolution* (Leiden and Boston, 2010).

55 Abad de Santillán Diego, *La F.O.R.A.: Ideologia y trayectoria del movimiento obrero revolucionario en la Argentina* (Buenos Aires, 1933); Jacinto Oddone, *Gremialismo proletario argentino* (Buenos Aires, 1949); Víctor Alba, *Historia del movimiento obrero en América Latina* (México, DF, 1964); Carlos Rama, *Historia del movimiento obrero y social latinoamericano contemporáneo* (Buenos Aires and Montevideo, 1967).

56 Robert J. Alexander, *Labor Relations in Argentina, Brazil, and Chile* (New York, 1962); Robert J. Alexander, *Organized Labor in Latin America* (New York, 1965).

57 Hobart A. Spalding Jr., *Organized Labor in Latin America: Historical Case Studies of Urban Workers in Dependent Societies* (New York, 1977); Charles Bergquist, *Labor in Latin America. Comparative Essays on Chile, Argentina, Venezuela, and Colombia* (Stanford, CA, 1986).

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latter interacted (and still interact) with equally dynamic research efforts in Latin American countries themselves.

Though the genealogy of the debates is highly complex (and has seen trends and counter-currents as well as convergences and dissimilarities), a few characteristic features of the research from the late 1980s until 2005 can be highlighted: firstly, in this period labour history was very much framed in an either national or local perspective and the comparative as well as continental impetus of earlier studies was lost.[58] Secondly, cultural turn inspired readings made a full impact in the 1990s and subsequent studies were highly likely to have one or several of the corresponding catchwords in their title (culture, identity, subjectivity, everyday, *barrio*, etc.); this resulted in an impressive broadening and enrichment but also left the field mired in perennial (and from today's point of view quite worn) debates about 'culture' vs. 'structure'. Thirdly, questions of gender appeared early and forcefully, yet in the 1990s they were predominantly discussed in terms of identity and subjectivity, while the actual work done by women and their position in the broad gamut of labour relations has come into focus again only in the last ten years.[59] Fourthly, methodologically, it saw a strong oral and testimonial turn as well as a spatial shift away from factories and into the *barrios* and everyday life. While the emphasis of many of these studies was on the formation of cultural subjectivities, they also increased the visibility of the range of activities which enabled households and neighbourhoods to make ends meet. Conceptually, this entailed the rise of the notion of *popular sectors* and the attribute *popular*.[60] Fifthly, it continued to cultivate a focus on the political

58 This was not, it should be remembered, a kind of methodological atavism but a reaction to the strong anti-localism of much of the previous dependency-inflected discussions. Besides, the studies about certain groups of workers such as coolies, cross-border migrant workers, etc. by default remained marked by broader perspectives.

59 The literature on gender and labour has, fortunately, become very extensive; for savouring the shifts in concerns and perspectives since the 1990s, the following sequence of interventions might stand in as a proxy: Ann Farnsworth, *Dulcinea in the Factory. Myths, Morals, Men, and Women in Colombia's Industrial Experiment, 1905–1960* (Durham, NC, 2000); Thomas Miller Klubock, *Contested communities. Class, Gender, and Politics in Chile's El Teniente Copper Mine, 1904–1951* (Durham, NC, 1998); John D. French and Daniel James, *The Gendered Worlds of Latin American Women Workers. From Household and Factory to the Union Hall and Ballot Box* (Durham, NC, 1997); Mirta Zaida Lobato, *Historia de las trabajadoras en la Argentina (1869–1960)* (Buenos Aires, 2007); Andrea Andújar *et al.* (eds), *Vivir con lo justo. Estudios de historia social del trabajo en perspectiva de género. Argentina, siglos XIX y XX* (Rosario, 2016).

60 For examples of studies which have introduced the attribute *popular* with great benefit, see: Gabriel Salazar, *Labradores, peones y proletarios. Formación y crisis de la sociedad popular chilena del siglo XIX* (Santiago de Chile, 1985); Luis Alberto Romero, "Los sectores populares en las ciudades latinoamericanas del siglo XIX: la cuestión de la identidad", *Desarrollo Económico*, 106 (1987), pp. 201–222. For a critical historical assessment of the move away from class and towards the 'popular' in the Argentine context, see: Lucas Poy, "Remaking *The Making:* E.P. Thompson's Reception in Argentina and the Shaping of Labor Historiography", *International Review of Social History*, 61, 1 (April 2016), pp. 75–93, at 79–84.

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allegiance of workers, especially in relation to the 1940s until the 1970s, when many workers followed the different variants of Latin American populism.

While many of these concerns and interests are still in place and must be seen as lasting enhancements of the field, the last ten years have seen some shifts again, namely a return to a more decidedly social historical analysis (including attention to the inter-connected co-existence of different labour relations), a revived and revamped interest in the study of political organizations, and a higher sensitivity for the transnational dimensions in the lives of workers and the development of organizations.

The 1920s saw the emergence of Communist parties and organizations all over Latin America, and, though Communism remained a minority or even marginal phenomenon everywhere, its influence on pivotal sectors of industrial workers or trade unions, its wider social and cultural impact, as well as its long-term ideational power both over (curious) sympathizers and (determined) foes should not be underestimated.[61] In the 1930s, Latin America experienced a deep rupture in its basic economic setup: the Great Depression stalled the export-oriented commodity production and in a number of countries a new economic model, the so-called *desarrollo hacia adentro* (inward-oriented development) with its corresponding attempt to build national industries able to substitute the importation of both investment and consumer goods, successively emerged. There is no space here to discuss the highly uneven results of these policies, suffice to say that it led to a substantial growth in the number of industrial workers.

This deep change went along with the rise of a new political formation, populism, which combined charismatic leadership, (often massive) popular mobilizations, nationalist, eclectic, and anti-elitist ideologies, and the fostering and systematic incorporation of trade unions (while at the same time repressing any independent labour mobilization). Although it played a role in numerous Latin American countries, its iconic trinity remains the reigns of Lázaro Cárdenas in Mexiko (1934 – 1940), Juan D. Perón in Argentina (1943/45 – 1955), and Getúlio Vargas in Brazil (1930 – 1945; 1951– 1954). Understanding the position of labour and allegiance of workers to these regimes has become one of the major topics, if not obsessions, of labour history from and about Latin America. Revisionisms and enhancements here abound, and interpretations have oscillated between views which see these regimes as alien to labour and as oppressive debauchers highjacking the autonomous traditions of workers and views that stress that populisms ably resonated with working class culture and identities and offered opportunities and platforms for advancing workers's con-

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61 For on overview of recent research on communism in Latin America, see David Mayer, "À la fois puissante et marginale: l'Internationale communiste et l'Amérique latine", in: *Monde(s). Histoire, Espaces, Relations,* 2016, Nr. 10, Special Theme "Dimension transnationale du communism", ed. by Brigitte Studer and Sabine Dullin, pp. 109 – 128.

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cerns and interests.[62] Milestones of the debate have especially been set in relation to Argentine Peronism: the debate started with the analysis of Gino Germani, one of the founding fathers of sociology as an academic discipline in Latin America, who stressed the demagogic manipulation of new, poor, and politically 'immature' layers of the working class. It was revised with the interpretations offered by Miguel Murmis, Juan Carlos Portantiero, etc. who revealed the degree to which long established unions and self-conscious and militant workers equally switched to Peronism.[63] Finally, it was fully reframed by the study by Daniel James that highlighted the congeniality of Peronism and workers's everyday worlds and subjectivities.[64] The latter was enhanced by further studies, often in-depth analyses of specific locales and oral sources.[65] Similar studies have pointed to the opportunities offered by *Varguismo* in Brazil.[66] In the case of Mexico, the challenge seems to consist less in the analysis of *Cardenismo* proper–as it was the most left-leaning of the populist regimes, professing a socialist ideology–yet more in analysing the allegiance of workers in the long subsequent reign of the state-party *Partido Revolucionario Institucional* (PRI) (which, soon after Cárdenas, broke with his left-wing aspirations).[67]

These debates about the aptitude of populisms for getting a grip on the imagination of workers and for advancing their interests can, however, eclipse the fact that from the 1960s on both industrial and political constellations started to change profoundly. In this process, countries varied greatly, yet there were also some common trends: firstly, the model of import-substituting industrialization began to show signs of stagnation or crisis (due to continued dependency on technology importation, the slow development of productivity, the dependency on a shield of protectionist policies, etc.). Some countries (Argentina, Brazil, and Mexico) responded with a partial (re-)opening to foreign investments which led to the establishment of new industries,

62 Gino Germani, *Política y sociedad en una época de transición, de la sociedad tradicional a la sociedad de masas* (Buenos Aires, 1962).
63 Miguel Murmis and Juan Carlos Portantiero, *Estudios sobre los orígenes del peronismo* (Buenos Aires, 1971).
64 Daniel James, *Resistance and Integration. Peronism and the Argentine Working Class, 1946–1975* (Cambridge, 1988).
65 Daniel James, *Doña María's story. Life History, Memory, and Political Identity* (Durham, NC, 2000); Mirta Zaida Lobato, *La vida en las fábricas. Trabajo, protesta y política en una comunidad obrera, Berisso (1904–1970)* (Buenos Aires, 2001).
66 John D. French, *The Brazilian Worker's ABC. Class Conflict and Alliances in Modern São Paulo* (Chapel Hill, NC, 1992); Alexandre Fortes *et al.* (eds), *Na luta por direitos. Estudos recentes em história social do trabalho* (Campinas, 1999). For an interpretation with an emphasis on the role of industrial employers see: Barbara Weinstein, *For Social Peace in Brazil. Industrialists and the Remaking of the Working Class in São Paulo, 1920–1964* (Chapel Hill, NC, 1996).
67 For two different ways to situate Cardenism, see: Alan Knight, "Cardenismo: ¿coloso o catramina?", and Ilán Semo, "El cardenismo revisado: la tercera vía y otras utopías inciertas", both in: María Moira Mackinnon and Mario Alberto Petrone (eds), *Populismo y neopopulismo en America Latina. El problema de la Cenicienta* (Buenos Aires, 1999), pp. 197–230 and 231–256. Also see: Norman Caulfield, *Mexican workers and the State. From the Porfiriato to NAFTA* (Forth Worth, TX, 1998).

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especially in car manufacturing and other metal processing. At the same time, previous statist policies had led to a massive growth of state-employed workers, especially teachers and other education workers. Both groups constituted new and highly militant sectors of the working class. These moved within–yet also beyond–the perimeters set by populism and unions loyal to them. Secondly, the Cuban Revolution exerted a pervasive influence all over the continent, creating new organizations on the left yet also affecting all existing political formations, including trade unions.[68] Thirdly, the rise of military dictatorships was explicitly directed against the social unrest and politization of the 1960s, and its repressive policies included and all-out attack on all labour-related organizations. The impact of the Cuban Revolution, the failures of its professed revolutionary voluntarism, and the rise of anti-revolutionary military regimes in the longer run meant a shift in the general set-up of social mobilizations: the traditional left was crushed, the appeal of the revolutionary vanguardism of its more radical currents faded, and new, more grassroots forms of social movements appeared in the niches of oppression. This ushered in the so-called *new social movements* in the 1970s and early 1980s which were seen by many proponents as expressly non-labour-related; in reality, however, connections and intersections between 'old' labour and 'new' social movements were manifold.

One of the landmark events reflecting both industrial changes and a new working class militancy is the *Córdobazo* in May 1969, an uprising of workers, students, and other parts of the population in Córdoba, Argentina's second-largest industrial centre. It evolved from a general strike in the city's car industry.[69] It can not only be compared or related to the intervention of factory workers in Europe in 1968/1969 but also to workers's mobilizations during the Allende years in Chile.[70]

A major development of the 1970s was the formation of *new unionism* in Brazil. Its ability to combine effective trade union struggles with elements of more grassroots-oriented new social movements and the everyday sociability of workers in their neighbourhoods has been researched in depth.[71] As is well-known, it played

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68 For one of the rare continental analyses of this impact (including labour movements), see: Thomas C. Wright, *Latin America in the Era of the Cuban Revolution* (New York, 1991).

69 James P. Brennan, *The Labor Wars in Córdoba, 1955–1976. Ideology, Work, and Labor Politics in an Argentine Industrial City* (Cambridge, MA, 1994); James P. Brennan and Mónica B. Gordillo, "Working Class Protest, Popular Revolt, and Urban Insurrection in Argentina: the 1969 Cordobazo", *Journal of Social History*, 27, 3 (Spring 1994), pp. 477–498.

70 Peter Winn, *Weavers of Revolution. The Yarur Workers and Chile's Road to Socialism* (Oxford, 1986); Frank Gaudichaud, *Poder Popular y Cordones Industriales. Testimonios sobre el movimiento popular urbano, 1970–1973* (Santiago de Chile, 2004).

71 Antonio L. Negro, *Linhas de montagem: o industrialismo nacional-desenvolvimentista e a sindicalizacão dos trabalhadores (1945–1978)* (São Paulo, 2004); Paulo Fontes and Francisco B. Macedo, "Strikes and Pickets in Brazil: Worker Mobilization in the 'Old' and 'New' Unionism, the Strikes of 1957 and 1980", *International Labor and Working Class History*, 83 (2013), pp. 86–111; Francisco Barbosa de Macedo, "Social Networks and Urban Space: Worker Mobilization in the First Years of 'New' Unionism in Brazil", *International Review of Social History,* 60, 1 (April 2015), pp. 33–71.

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a major role in the country's re-democratization process at the beginning of the 1980s and the foundation of a new workers's party, the *Partido dos Trabalhadores* (PT) which, under Luís Inácio (Lula) da Silva, rose to national significance and later to government power (2003 – 2016).

The 1980s and 1990s witnessed a protracted crisis of industrial labour and labour movements: the ascendancy of neoliberalism brought de-industrialization on the one hand and the establishment of export-oriented, union-free, and highly exploitative special production zones (*maquiladoras*) on the other. With rising unemployment, precarization of formal employment, a further expansion of the informal sector, and the onset of a large stream of labour migration towards the USA (from Mexico and Central America), Europe (for instance from Ecuador), but also within Latin America, unions and labour-related organizations greatly weakened and the urban industrial working class, at least in its previously known form, depleted. This recomposition of the working class–which includes processes such as terciarization, precarization, feminization, and transnationalization–is continuing up until today.[72] At the same time, some remarkable countervailing tendencies have appeared since the beginning of the 2000s: the level of formal occupation rose again in numerous Latin American countries. In the context of a series of highly militant or even insurrectional mobilizations and the rise of expressly progressive projects to political power (ranging from the moderate, such as Lula in Brazil or Bachelet in Chile, to the more radical and contesting, such as Chávez in Venezuela or Evo Morales in Bolivia), government policies have used an economic boom (again largely based on export commodities) to reduce outright poverty, formalize employment, and raise minimum wages. For the first time in decades, inequality has decreased in Latin America.[73] While the tide of left-wing or progressive governments has started to recede again, trade unions in Latin America and labour-related political organizations confront an uneven situation. The structural weakening since the 1980s has not been made good–neither the working class nor its organizations could acquire previous levels of socio-ideological coherence again. At the same time, the major example of a labour-related party, Brazil's PT, which had been celebrated as a 'new type of party' due to its ability to give social movements ample space,[74] is currently not

72 Enrique de la Garza Toledo, "La flexibilidad del trabajo en América Latina", in: Enrique de la Garza Toledo (ed.), *Tratado latinoamericano de sociología del trabajo* (México, DF, 2000), pp. 148 – 178; María Angélica Rodríguez Llona and Paula Vidal Molina (eds), *Transformacion(es) del trabajo, tiempo(s) de precariedad(es) y resistencia(s): algunas aproximaciones desde Latinoamérica* (Buenos Aires, 2013). For an influential theoretical intervention on the 'crisis of labour' see: Ricardo Antunes, *Adeus ao trabalho? Ensaio sobre as metamorfoses e a centralidade do mundo do trabalho* (São Paulo and Campinas, 1995). Also see the ILO regional annual reports: OIT/Oficina Regional para América Latina y el Caribe, *Panorama Laboral América Latina y el Caribe* (Lima, 1994 ff.).

73 Branko Milanovic, "More or Less", *Finance and Development*, 48, 3 (September 2011), pp. 6 – 11, at 10.

74 Michael Löwy, "A New Type of Party: The Brazilian PT", *Latin American Perspectives*, 14, 4 (Autumn 1987), pp. 453 – 464.

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only in a deep crisis; during the years in power it also lost a considerable part of its previous movement components. The working class as formal-sector wage-earners engaged in urban industry or services thus seems splintered. This dire and conventionally pessimistic panorama, however, has to be contrasted with the remarkable instances of workers's militancy in many Latin American locations and the fact that Latin America is currently probably the only region in the world where the twentieth-century combination of liberationist and workers ideologies still is able to appeal to significant (though minority) numbers of the subjects addressed, i.e. to be appropriated by workers struggling both to improve their situation and to nurture a more general imagination of a better world.

In May 2017, a large Latin American labour congress, entitled "Work and Labourers–Past and Present", was held in La Paz, Bolivia; it resulted in the foundation of a new network of Latin American labour historians.[75] The papers presented reveal how far labour history in Latin America has continued to evolve from the 'state of the art' given in the overviews by John French and James Brennan ten years ago:[76] paid and unpaid activities were discussed on equal terms, the unemployed figured just as those in employment, rural labour was envisaged as a fundamental part of the worlds of labour, the free-unfree-continuum and its manifold intersections received ample attention, the work of women (especially in its informal, domestic, or self-employed forms) was analysed in numerous presentations, and the nexus of labour and migration (again) constituted a central concern. Also, the conference featured important temporal enhancements: both the colonial or immediate post-colonial eras as well as contemporary labour studies were included. The congress, however, has also shown that comparative, interregional, or transnational perspectives are still quite rare in labour history research from and about Latin America. The newly founded network, meanwhile, offers the opportunity that such perspectives are facilitated through one of its material preconditions: the closer collaboration of researchers from different countries in the region itself. With that, Latin American labour history thus might experience a further uplift in the coming years–not least by its regionalization and intra-continental linking.

75 See <http://ctt2017.cis.gob.bo/inicio>. The provisional name of the network is Red Latinoamericana de Trabajo y Trabajador@as (RELATT).
76 Brennan, "Latin American Labour History"; French, "Laboring and Middle-Class Peoples of Latin America".

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