

# A SURVEY OF RECENT CHILEAN HISTORIOGRAPHY, 1965–1976\*

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The past eleven years have been extremely fruitful for Chilean specialists. Various scholars have formulated theories to explain Chile's political, social, and economic development; new monographs as well as doctoral dissertations have provided grist for the generalist's mill; and studies on mining—particularly the nitrate sector—agriculture, the role of labor, and more detailed political surveys have been published. Increasingly, one notes a tendency to undertake projects that will investigate twentieth-century topics. This essay reviews some of the recent contributions to Chile's already rich historiography and attempts to include material from other disciplines as well as history. It will not, however, discuss the Allende period, whose massive and still growing literature requires separate treatment. Those interested in this topic might profitably consult the recent work of Arturo and Samuel Valenzuela, "Visions of Chile" (*LARR* 10, no. 3 [1975]:155–75).

A few overviews of Chilean history have appeared. One still unfinished project is a four-volume study, under the general editorship of Sergio Villalobos; three volumes are in print. The first contains two essays: Osvaldo Silva covers the often ignored pre-Columbian period, and the late Patricio Estellé describes the *conquista*. Estellé and Villalobos collaborated on the second volume, which analyzes the seventeenth and eighteenth centuries. The latest book also contains two essays: a synthesis of the Independence period and the formation of the Portalian Republic, by Villalobos; and a work by Fernando Silva on the period 1830–60. These volumes, although without footnotes or bibliography, provide a useful summary of Chile's history. The authors have not only included material on Chile's politics but, in richly illustrated tomes, have sought to incorporate information on its economic and social development as well.<sup>1</sup>

The late Jaime Eyzaguirre also published a comprehensive work on Chile, in two volumes: the first, a reprint of a 1965 study, describes Chile from its pre-Columbian beginning through 1817; the second, *La definición del estado y la integración de la sociedad*, extends his analysis up to 1861. (Originally this volume was to include the Balmaceda period, but the author's untimely death cut short this work.) Elegantly illustrated, these volumes also describe the lives of the people of Chile as well as emphasizing that nation's economic, social, and cultural development.<sup>2</sup>

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An extremely ambitious project is Luis Vitale's *Interpretación marxista de la historia de Chile*, an effort which has been interrupted, hopefully for only a short time, by the 1973 coup. Vitale's initial volume combines a study of pre-Columbian Chile and the impact of the conquista. According to Vitale, Spain was still emerging from feudalism when it undertook the conquest of the New World. The discovery of this new continent provided the Iberian nation with the opportunity to establish a capitalist society. Chile, unlike other nations, did not have to pass through a feudal phase but was integrated into the worldwide capitalist economy as a raw material producer.

In the second volume, Vitale concludes, not unexpectedly, that the War for Independence was basically economic in nature, a clash between competing economic groups. Proponents of independence argued that an end to Spanish domination would bring free trade, improve opportunities to market their own products, end the flight of specie from Chile, reduce taxes and institute protectionist laws to insulate home industries, and create a merchant marine. Initially, the wealthy directed this revolution; the lower classes did not become involved until Spanish repression drove the proletariat to join the resistance movement, mainly as guerrillas under the leadership of men like Manuel Rodríguez. The influence of ideology was minimal: landowners, miners, and merchants used Liberalism to rationalize a change in the political façade, but they refused to alter the fundamental structure of society.

The third volume emphasizes the participation of the lower classes in the latter part of the revolution, which Vitale claims traditional historians have refused to acknowledge. "La guerra a muerte" (1819–22), he argues, should be more deeply analyzed because it reveals an abortive attempt by workers and peasants to revamp Chile's economic and political institutions. Unlike other scholars, he considers the 1833 constitution as the consolidation of the power of the emerging bourgeoisie; the institutionalization of an export economy based upon the sale of Chile's agricultural and mineral products. By refusing to industrialize Chile, the bourgeoisie merely intensified the Spanish colonial heritage of underdevelopment. Indeed, Chile was forced to continue in the role of a raw material exporter in order to pay for imported British manufactured goods and to service its foreign debt, which had been floated in London. Vitale's work is innovative, well researched, and a splendid example of Marxist exposition.<sup>3</sup>

Two Americans have dedicated their efforts to a general history of Chile: Jay Kinsbruner has written a short work that is designed for classroom use; and Oxford University Press has commissioned Brian Loveman to do a similar study for its Latin American Series.<sup>4</sup> Hernán Godoy describes Chile's social development from its inception to the modern period. His unique volume of edited works, which combines commentary as well as useful primary and secondary materials, also includes an extensive bibliography.<sup>5</sup> Some recently published reference works may also prove helpful. The political dictionary of Lia Cortés and Jordi Fuentes, which complements their earlier work, is quite good and an excellent source for information on Chile's myriad political parties and its various public figures. Salvatore Bizarro's work, on the other hand, is often of uneven quality, particularly for the nineteenth century.<sup>6</sup>

Many authors have focused on the political aspects of the Colonial period. Fernando Silva studies the functioning of the Hacienda Real and records the results of its first *visita*. Della Flushe demonstrates how Santiago's cabildo struggled to improve the health care of its citizens as well as how it interacted with the clergy. Some scholars have paid more attention to the relationships of Church and state. Father Aliaza Rojas has noted that, contrary to the provisions of the Patronato, Chilean bishops communicated directly with the Holy See. Clerics, particularly members of the Society of Jesus, sought to stop forced Indian labor and to end the frontier wars; but, as Father Eugene Korth observes, the demands of the elites for manpower prevented either the clergy or local government officials from implementing reforms designed to improve the situation of the Indian.<sup>7</sup>

Numerous historians have challenged the supposed impact of the Bourbon reforms. Fernando Silva's work shows that the Contaduría Mayor often functioned independently of Spanish bureaucrats and actually worked, at least during the administration of Ambrosio O'Higgins, as an agent of decentralization. Jacques Barbier also demonstrates that the Bourbon monarchs could not alter the political culture of the Hapsburgs and that friendship and marriage between Creoles and Spanish colonial officials blunted many of Madrid's proposed changes. Indeed, as both Silva and Carlos Ugarte note, Chileans began to chafe under imperial rule and soon began to formulate some of their own policies.<sup>8</sup>

Disagreements over administrative goals were but one factor in a growing split between Spain and Chile. Differences in racial composition, economic competition within the empire as well as with Spain, and Jesuit ideology produced a vague sense of Latin American regionalism that eventually matured into nationalism.<sup>9</sup> Simon Collier argues that the Chileans wedded a growing pride in their indigenous traditions to European Liberalism in order to rationalize their independence movement.<sup>10</sup> Mary Felstiner and Roger Haigh, on the other hand, see the Independence period as a struggle between aristocratic families anxious to protect and expand their power. Eventually this ambition precipitated not only the struggle against Spain, but a civil war among the triumphant families.<sup>11</sup>

Raúl Silva Castro provides us with a list of the participants in the 1810 Cabildo Abierto.<sup>12</sup> Within seven years, Spanish officials had deported to Juan Fernández those who supported the "gobierno intruso."<sup>13</sup> Small wonder that the remaining sixty-one who composed the 1817 Cabildo Abierto were either Royalists or too discreet to proclaim their dissatisfaction with that cause.<sup>14</sup> The odyssey of one exile, Manuel de Salas, has also been traced, as well as the fate of a Spanish Royalist.<sup>15</sup> The independence movement not only disrupted individual lives but even convulsed supposedly spiritual organizations like the Cabildo Eclesiástico.<sup>16</sup>

Once independence had been achieved, the nation still faced important political decisions. During the period 1817–30, Chileans experimented: new constitutions were implemented and rejected; new ideas were debated; the war in the south was fought; and Peru was freed.<sup>17</sup> Distressed by the failure of the new leadership to achieve political stability, portions of the nation's elite, par-

ticularly the *estancieros*, rebelled.<sup>18</sup> When the civil war ended, Chile had returned to its Spanish heritage—to a highly centralized government and to a legislature whose powers were more consistent with the Cortes than with the assemblies of France or Anglo-America.<sup>19</sup> The noble experiment with federalism failed, Simon Collier argues, because it was inappropriate to Chile's political culture.<sup>20</sup> Other historians claim that federalism had falsely raised too many expectations; when it could not satisfy these promises, it fell into disrepute.<sup>21</sup> The nation that emerged from the unrest of the early nineteenth century was to bear the imprint and name of Diego Portales—a conservative government to be ruled by the wealthy and the powerful—although some claim that the influence of the merchant prince has been over emphasized.<sup>22</sup>

The first serious assault upon the stolid structure of Portalian Chile came with the 1851 and 1859 rebellions. According to Luis Vitale, the 1848 Revolution in France, Santiago's exploitation of the provinces, and heavy mining taxes unified traditionally diffuse elements into an alliance that reacted violently against the government. When the proletarian participants tried to radicalize the 1851 movement, the bourgeois rebels capitulated. The suppression of the rebellion did not eradicate its root causes: increased taxation, economic depression, and the animus of the northern miner and southern farmer toward the commercial and landed elites of Santiago precipitated another outbreak of hostilities in 1859. The rebels failed again but, as Vitale notes, this defeat was not unexpected: the alliance of such disparate elements proved unequal to the combined efforts of the oligarchs and the ships of the British navy. Had the rebels triumphed, they would have squandered their victory in dissent.<sup>23</sup>

Some historians have concentrated their efforts upon describing the effects of the civil war on specific cities. Ruth Iturriaga, who supports the economic interpretation of the 1851 rebellion, traces the resistance of La Serena. Guillermo Donoso, however, argues that purely local events, many totally divorced from economic factors, produced the 1851 outbreak in Talca.<sup>24</sup>

The 1859 defeat did not destroy Liberalism. Within a decade of Cerro Grande, Liberal *clubs de la reforma* were preaching their secular gospel.<sup>25</sup> By the 1870s, the Conservative party had ceased participating in government and instead became a political leper, permitted to hold seats in the legislature but not a ministerial portfolio. Cristián Zegers analyzes the regime of Aníbal Pinto (1876–81), one of the first Liberals to rule after the collapse of the Liberal-Conservative fusion.<sup>26</sup> Pinto, a lackluster but honest man, had the misfortune of ruling a nation first beset by a severe economic depression and then tried by the War of the Pacific. Contrary to what many have believed, this struggle failed to generate much enthusiasm among the civilians nor did it reveal the Chilean military to be particularly adroit.<sup>27</sup> On the contrary, the conflict severely strained Chile's resources and tested its leaders both civil and military. Chile eventually triumphed due mainly to the heroism of its troops and the ineptitude of its enemies.

One of the most popular themes of modern Chilean historiography is the martyr President José Balmaceda. The studies of Julio César Jobet and Hernán Ramírez Necochea argue that a nefarious British nitrate magnate, John Thomas North, working in league with his Chilean lackies, overthrew the economic

nationalist Balmaceda because he threatened North's mining interests. A less satisfying work is Crisóstomo Pizarro's, which argues that Balmaceda's policy of enlarging the bureaucracy and encouraging immigration threatened to displace the elite's power base. Consequently, the oligarchy moved against the president who could not defend his regime because both the working class and the progressive Democratic party were too weak to help him.<sup>28</sup>

Recent scholarship challenges the economic and sociological interpretations of Balmaceda's fall. Harold Blakemore carefully investigates the role of the nitrate baron in Chile. He concludes that North had capitalized on inside information to purchase controlling interests in various *salitreras* located in Tarapacá. The Englishman subsequently acquired holdings in a bank and a local waterworks. Perhaps North's greatest asset was the Tarapacá Nitrate Railway Company, the only rail link between the salitreras of the interior and the embarkation ports of Iquique and Pisagua. Because he enjoyed a monopoly, North could and did levy excessively high freight charges. The *salitreros* had but two choices: pay the inflated charges or sit on their nitrates.

By the late 1880s, the nitrate export tax not only provided Chile with 40 percent of its ordinary revenues, it constituted the life force sustaining Balmaceda's ambitious and expensive public works program. Eventually, he concluded that because it could reduce the flow of nitrates to the coast, North's railway concession posed a threat to this program. The president also feared the formation of nitrate cartels or combinations, which sought to increase the world market price of salitre through restricting production. But any reduction in the exports of this mineral would reduce the nation's revenues. Thus, in 1889, Balmaceda launched a series of verbal attacks on the presence of foreign interests and cancelled North's railroad monopoly, in hopes that this would open the area up to competition, reduce freight costs, and stimulate production. It was this act, in conjunction with threats to nationalize the salitreras, the Left argues, which drove North and his Chilean minions to overthrow the Balmaceda government.

Blakemore questions Balmaceda's commitment to economic nationalism. The president authorized the sale of publicly owned nitrate lands to foreign interests, and, although Balmaceda had revoked North's railroad concession, he was willing to grant similar privileges to other British capitalists. He opposed North's railway monopoly not because it was foreign owned but because it limited nitrate revenues; for this same reason he opposed the formation of nitrate cartels. If North had indeed supported the Congressional forces, he was quickly disappointed: the new leaders would not restore his railroad concession. As the author cogently argues, we must seek the causes of the 1891 revolution in Chilean domestic politics and not in the supposed machinations of foreign capitalists.<sup>29</sup>

Julio Heise González's *Historia de Chile: el Periodo Parlamentario, 1861–1925*, provides precisely this information. Through a detailed study of Chilean constitutional law and precedent, he demonstrates that Chile had evolved into a de facto if not de jure parliamentary democracy. Lamentably, Balmaceda refused to accept the fact that this transformation had occurred: his arbitrary policies alienated his allies, the Montt Varistas; his attempts to impose his successor

divided his own Liberal Party; and he became so isolated that he sought to forge an alliance with the ultramontane Conservative party. When, late in 1890, the president would not replace his ministers as the legislature demanded, congress retaliated by refusing to approve the national budget for the coming year thus precipitating the rebellion. Heise's portrait of Balmaceda contradicts those painted by earlier historians who had praised the president as a defender of the working class. Instead, Balmaceda is shown to have cruelly suppressed the nitrate strikers of 1890 and to have harassed the progressive Democratic party. Far from a sympathetic figure, he emerges as an insensitive autocrat ruling his nation with methods that were both brutal and inappropriate for the politically sophisticated Chileans.<sup>30</sup>

Raúl Silva Castro is even less generous in his appraisal of Balmaceda. In what may be charitably described as a psycho-historical approach, Silva argues that the neurotic president could not accept that he was not all powerful and that he would have to compromise with his legislature. Balmaceda is not only blamed for starting the civil war but for prolonging it; for ordering the destruction of the nitrate works, in order to deprive the Constitutionalists of financial support for their cause; for not abdicating after Placilla; and for not surrendering Valparaíso and Santiago to the revolutionary junta, which would have spared the nation additional bloodshed and looting. Silva even denigrates Balmaceda's suicide as an unnecessary romantic gesture, the act of a narcissus who fears that he might suffer reprisals for his earlier intransigence.<sup>31</sup>

Blakemore and Heise have provided us with perhaps the most definitive works on the Balmaceda experience. Unfortunately, the Parliamentary Regime (1891–1925), the creation of the 1891 revolution, still remains largely untouched. Traditionally, many consider this an era of inept government and excessive expenditures—*la clase derrochadora* wasting its patrimony, and that of the motherland, in an orgy of conspicuous consumption. The civil war ended decades of strong executive leadership; henceforth, local government, not Santiago, regulated the elections. The *hacendados*, who could impose their will on their *inquilinos*, became the power brokers—*caciques* who either exercised power directly or dispensed it to their cronies. This corruption spread to the city where the recent migrant followed the urban *politico* as blindly as his former *patrón*, or fell under the domination of his employer. The more independent simply sold their vote, thus assuring themselves of a small but gratefully received annuity. Heise argues that such political abuses afflicted all nations evolving from a “semi-feudal agrarian structure [to an] industrial society.”<sup>32</sup> Eventually, the infusion of new cultural ideas, the First World War, urbanization, and changes in the agrarian structure as well as public morality began to alter the system. Indeed, after 1915 the *cacique's* power started to wane and by 1921 it had virtually ceased to be effective.

Many Chileans repudiated the system of *cohecho*, or political corruption. Pedro Montt, for example, originally a leader in the movement to establish parliamentary rule, unsuccessfully sought to reform the system he helped create. Unhappily, as Juan Eduardo Vargas notes, the political parties—Liberals, Conservatives, and Radicals—had become baroque institutions with ossified ideologies.

Still, new forces, like the Partido Nacionalista, demanded a return to a strong presidency and economic nationalism long before the rise of Alessandri.<sup>33</sup>

Although these reforms were to wait for years before implementation, the Parliamentary leaders were not unmindful of the need for change. The Cuestión Social, first articulated by Orrego Luco in 1884, became a rallying point for reformers.<sup>34</sup> This movement struggled to improve the working and living conditions of the lower class and, contrary to what is generally believed, the Right did not oppose such proposals. Indeed, the Unión Católica and Catholic intellectuals such as Juan Enrique Concha and Vicente Echeverría sought workmen's compensation, the creation of agricultural colonies, improved working conditions, and decent housing for the lower class. As Silva Vargas and Pedro Iñiguez demonstrate, Conservative party support of the "social question" antedated that of the Radical party and it was the Right which encouraged President Riesco to work more actively to implement reform. James Morris indicates that the middle-class Alianza Liberal also supported a program, formulated by Jorge Errázuriz and Benjamín Vicuña, to improve working conditions. Both the approach of the Alianza and that of the Conservatives was basically paternalistic—elitist noblesse oblige for which the poor were to be vocally grateful. When these reforms finally became law, moreover, it was because of the 1924 coup and not through the traditional legislative process.<sup>35</sup>

Unfortunately, there is no definitive study of the Parliamentary regime. Some historians have analyzed the ideological positions and political platforms of the various parties during the congressional and presidential election of 1915–16.<sup>36</sup> Similar research projects would obviously increase our understanding of this period. Fernando Pinto Lagarrigue has written a general study of the twentieth century that offers some brief insights into the Parliamentary period, but generally the work is superficial, and Jorge Barriá's Marxist overview is too cursory.<sup>37</sup>

Perhaps the best work yet to appear is still Heise's *Historia*, which seeks to refute the argument that the Parliamentary period was politically sterile. Indeed, he argues that the years 1891–1924 provided time for the emerging bourgeoisie to learn the art of politics; a transitional period from the oligarchical government of the nineteenth century to the age of mass democracy that began after 1925. The author does not deny that the Parliamentary regime was elitist but, he notes, so was every democracy at that time. Despite its defects, the Parliamentary governments permitted freedom for the individual, the press could function, intellectuals could dispute, and new cultural imports transformed the nation.<sup>38</sup> But Heise overstates his case; the ruling class was not as virtuous as he claims. The repression of labor unions, the wrecking of insolent left-wing presses, and the harassment of Recabarren indicate that individual liberties had become the prerogatives of the *gente decente*. Ironically, some historians like Enrique Reyes seem almost delighted with this repression because it forged a sense of class consciousness which became the seedbed of the Left—the Anarchists, the Partido Obrero Socialista, and the Communists.<sup>39</sup>

Chile, at least, was stable when compared with other Latin American nations. Despite the government of men like Barros Luco—whose most lasting

contribution to posterity apparently was the introduction of the grilled meat-and-cheese sandwich that still bears his name—Chile survived intact. Like France during the Third Republic, it was government by inertia and bureaucracy. That it even functioned at all under these circumstances should merit some admiration no matter how tinged with irony.

The chronicle of the collapse of the Parliamentary government and the meteoric rise of Alessandri, although analyzed to some extent, still remains incomplete. For example, the role of the military in the 1924–25 coups is unclear: René Millar argues that the officer corps was most displeased about wretched salaries and poor career opportunities, and the younger officers did not intend to launch a coup until Alessandri enticed them into the political cockpit. Frederick Nunn, on the other hand, claims that the desire for general reform as well as professional discontent encouraged men like Grove and Ibáñez to act.<sup>40</sup> The actual overthrow has most recently been described as well in the entertaining but anecdotal study of Raúl Aldunate Phillips.<sup>41</sup>

Although the 1925 constitution invested the president with greater power, Arturo Alessandri never finished his term of office. Some historians claim that he fell because he could not fulfill his earlier promises.<sup>42</sup> Ibáñez, on the other hand, enjoyed more success perhaps because he assumed the presidency unfettered by earlier commitments and, as Hugh Bicheno notes, unrestrained by political ideology or affiliation. The first Ibáñez regime (1927–31) accomplished a great deal and managed to establish many of the institutions that became the foundation of modern Chile. Unhappily, the general's political methods and crass repression engendered hostility that soon was transformed into various attempts to overthrow him. Carlos Charlin ably describes the abortive Calais conspiracy and the ludicrous affair of the *Avión Rojo*, and also records the eventual collapse of Ibáñez, the Montero interregnum, and the first part of the Socialist Republic of 100 Days. This is one of the few comprehensive studies of this crucial period and constitutes an excellent source for anyone interested in this era.<sup>43</sup>

The depression that overturned Ibáñez had other political ramifications as well. Reforms that would have been impossible to implement earlier became feasible because the electorate itself had become more liberal. Former supporters of Barros Borgoño became converts to the cause of Alessandri, while those who once followed the Lion of Tarapacá—the left wing of the Radical party, the *demócratas*, and the working class—switched their allegiance to the new forces on the political horizon: the Communists and Socialists. The Chilean upper class accepted state involvement in economic development and revisions in the electoral system, in part because it benefited them, but also because these changes were far more palatable than the more radical measures being proposed.<sup>44</sup>

Numerous scholars have emphasized the growth and the role of specific political parties. Luis Palma and Peter Snow, the latter with more success, have studied the Partido Radical. George Grayson's book traces the Christian Democrats from their inception to the Frei administration. The internal struggles within the Socialist ranks, from the founding of the party in 1932 through the Second World War, are analyzed by Paul Drake. Jack Thomas concentrates on the cau-



dillo-like figure of Marmaduke Grove—the Marxist who is reputed not to have read Marx—and describes his abortive 1932 campaign for the presidency when he was nominated while imprisoned in the South Pacific. Miriam Hochwald's dissertation examines the various forces that influenced the growth of the Socialist party. Julio César Jobet and Alejandro Chelen Rojas, themselves prominent Socialists, have also written histories of this Marxist party. Perhaps the best work is the joint effort of Fernando Casanueva and Manuel Fernández who not only trace the historical development of the Socialist party, but describe its ideological growth as well as its interaction with other political organizations.<sup>45</sup>

The ephemeral and happily short-lived National Socialist Party has been studied by Michael Potashnik, who analyzes the intellectual roots of the movement and its contradictory role in Chile's history—it was the only Nazi party to support the Popular Front, a political coalition of the Left designed to oppose Hitler.<sup>46</sup> If the dissertations now underway in both the United States and England are completed, we shall have more information on the various political parties, particularly on the Communists. The latter addition would be most welcome and would supplement the well-known but partisan work of Hernán Ramírez Necochea.<sup>47</sup>

Some general works describing Chile's political system have also appeared. Ben Burnett analyzes the various pressure groups operating in Chile, while Federico Gil studies not only the nation's historical development but includes information on the various political parties and recent electoral contests, as well as dissects the organization of the government, bureaucracy, and official agencies. Weston Agor probes the functioning of the senate.<sup>48</sup>

Germán Urzúa Valenzuela and Anamaria García have written a history of the bureaucracy from 1818 to 1968. This work, which is invaluable for the post-1925 period, traces the growth of various state institutions and their participation in the nation's social and economic development.<sup>49</sup> Urzúa has also written a general survey of Chilean political history. His initial essay describes how Chile's first parties evolved from unstable pressure groups to organizations that stressed the personality of their leader more than ideological purity. During the Portalian period, a Partido Oficial developed, but it dissolved eventually because of dissent within the aristocracy. Although a variety of political parties emerged, they were primarily concerned with abstract issues and did not become involved in social or economic questions until the turn of the century. Urzúa notes the changes produced by adopting platforms that advocated more than political reform, by the formation of the Partido Demócrata, and by the creation of the Marxist Left, which he analyzes along with the more traditional political organizations.<sup>50</sup>

As we progress into the 1930s, the material seems to decline in quantity. What has appeared tends to be autobiographical—the works of Alessandri, González Videla, Guzmán, and the professional apostate Marcos Chamudes—and hence less objective. Some of the few synthetic works are uneven in quality and partisan, like those of Jorge Barria and Hugo Zemelman; Bicheno's "Anti-Parliamentary Themes" provides a panoramic sweep of the post-1920 period; Maria Infante concentrates on the 1938 presidential election; and Richard Super's dissertation is a detailed chronology of the Popular Front (1938–41).<sup>51</sup>

If the 1930s have been barely touched, the subsequent decades are a virtual *tabula rasa*. With the exception of Arturo Olavarría's last two volumes and his *Chile bajo la democracia cristiana*—neither one of which is striking—the area is open for the historian. We have precious few works on Ibáñez, Alessandri, or Frei and almost nothing on Ríos or González Videla.<sup>52</sup> The recent coup will doubtless divert the efforts of many. Indeed, there have already been numerous works written—some with mixed results—and more shall be available soon. While this topic is of great importance, an understanding of pre-1970 Chile will be essential if we are to put the Unidad Popular experience into perspective.

Ironically, one of the major events that transformed Chile's economy occurred not within that nation but in Peru: an earthquake in 1687 destroyed much of the Lima valley irrigation system and devastated local agriculture. Stimulated by the opening up of the Peruvian market, Chile changed from a pastoral economy to cereal cultivation. Land was enclosed and intensively cultivated and the scattered rural labor force was concentrated on the farms, while its duties were increased and its perquisites were diminished. Chile became a seigneurial society, a nation whose economic power was concentrated in the landowning elite.

While the Central Valley, particularly the Santiago area, became largely agricultural, the economy of the Norte Chico was not so drastically altered. In La Serena, mining continued to flourish and hence competed with the hacendados for labor. The north, moreover, did not export as much grain because local miners consumed it. Concepción, on the other hand, formerly the center of livestock production, also began the cultivation of wheat. Generally, a seigneurial social structure accompanied the adoption of cereal production. Because of its geographical location, Santiago emerged as the nation's principal economic center. Its commercial elite became the middlemen between the hacendado and the Peruvian and, later, the British merchant, exchanging Chilean wheat for European manufactured goods. Thus, according to Marcello Carmagnani, Chile became a raw material producer, subordinating itself first to the markets of Peru and, after Independence, to England.<sup>53</sup>

Demetrio Ramos demonstrates that the economic relationship between Lima and Santiago was more complicated. Traditionally, Chile's local officials had to reconcile two opposing goals: that of the wheat producer, who sought the maximum price and the widest market for his goods; and that of the consumer, who demanded inexpensive food. Santiago's *cabildo* normally tried to delay the export of cereals until the needs of the local population were first satisfied; consequently, Chilean wheat exports to Peru often fluctuated in response to domestic demand.

In the early eighteenth century, Peruvians again began to cultivate wheat because of a temporary decline in Chilean production. Not unreasonably, Peruvian agriculturalists demanded protection from foreign competition. Chilean hacendados, anxious to retain their (by now) traditional markets, resisted these measures and were fortunate to discover that they had the support of Callao's

shipping and commercial interests. When Portobello's fair became less lucrative, the *navieros* of Callao sought new markets. They quickly perceived that exporting wheat from Chile to Peru might compensate them for the destruction of the *flota* system. Consequently, Peru's *navieros* joined Chile's *hacendados* in demanding that Viceroy Manso de Velasco permit more wheat to enter Lima.

Anxious to make Peru self-sufficient in wheat and yet unwilling to alienate another portion of the empire, he compromised: henceforth both Chilean and Peruvian wheat would be sold in Lima. The *navieros* encouraged the use of Chilean grain by selling it on credit to Lima's bakers, and the Callao merchants cornered the Chilean end of the market, manipulating farm prices and thus artificially depressing them. Later, in 1755, Peruvian farmers again demanded a preferential position on the local market. This request antagonized not only the *navieros* but the Chilean *hacendado* class, who requested that Captain General Manuel Amat defend them. The latter demanded that the Peruvians cease discriminating against Chilean imports.<sup>54</sup> Carlos Ugarte also indicates that Santiago's *cabildo*, which had earlier prohibited exports, now sought to protect the wheat farmer against fraudulent practices and to expand his markets. It was partially due to the *cabildo* that discrimination against Chilean products ended and that Chileans could sell their wheat directly to Panama, thus destroying the Peruvian wheat monopoly.<sup>55</sup>

Trade with Argentina, which had begun in the sixteenth century, expanded substantially after the Bourbon kings opened the Strait in 1740,<sup>56</sup> and eventually this route superseded the Pacific connection. Henceforth, Chile received a steady stream of supplies, through legal as well as clandestine channels, from the Platine area. Indeed, both Villalobos and Eyzaguirre conclude that the 1811 Free Trade Decree was mainly a political gesture that the local commercial elites opposed.<sup>57</sup> Certainly the Bourbon reforms reduced Chile's dependence upon Peru. As Silva Vargas notes, Chile had embarked upon economic policies designed to end Peru's control. By the end of the O'Higgins administration, the Peruvian viceroyalty could no longer impose its policies upon its southern neighbor.<sup>58</sup> Chileans had developed local institutions—the mint and the *consulado*—which freed the nation from depending upon the viceroyalty in Lima.

Other scholars do not agree that Chile enjoyed much material progress in the Colonial period. Hernán Ramírez Necochea, for example, argues that Chile possessed no national industries, that it suffered from trade deficits, and that it continued to be exploited by both the empire and its enforcer, the viceroyalty of Peru. It was to correct this economic imbalance that the Creole elite rebelled against Spain. André Gunder Frank claims that independence did not end the economic servitude: Chile simply exchanged masters and English replaced Spanish as the language of the exploiters who dominated the new nation's commerce, copper, wheat, and, later, nitrates. Seduced by the false doctrine of free trade and the glitter of European consumer goods, Chileans rejected protectionism and instead kept their nation a raw material producer—an economic capon incapable of reproducing its wealth. Some national industries developed, but Frank argues that these were dominated by either foreigners or first-generation

Chileans who happily betrayed their new homeland to gratify England. Indeed, according to Jacinto Vaello, Chile became a virtual dominion of Britain which, in league with local capitalists, liquidated the nation's industry, denationalized the nitrate mines, and even asserted its power over Chile's economic structure.<sup>59</sup>

A more reasoned proponent of the dependency thesis is the Italian scholar Marcello Carmagnani, who blames the failure to develop industries on the lack of capital accumulation. This phenomenon, which the author claims characterized the entire Hispanic world, was due to the overwhelming presence of an industrialized Europe, particularly England. Historically, Chile had been subordinated to Great Britain but this servitude became institutionalized during the period 1870–95. A worldwide depression reduced the price of raw materials, Chile's principal export; simultaneously, English capital began to flow into Chile, particularly its salitreras. This new money stimulated raw material exports and accelerated the decline in commodity prices. Thus Chile found it extremely difficult to accumulate the funds needed to modernize the rest of its economy. Some industry did develop, in part because of domestic inflation—the declining peso increased the price of foreign goods, providing Chile with a *de facto* system of protectionism—but Chilean industry remained at a primitive level, producing mainly nondurable consumer goods. Manufacturers, moreover, could not compete successfully with other sectors of the economy, particularly banking, for the capital needed to modernize and expand plant facilities. Even when the state began to participate in economic development, it did not alter the basic dilemma: the cost of equipment that quickly became outdated simply increased the nation's indebtedness and thus deepened the cycle of dependency. Indeed, since foreigners controlled mining, the most dynamic sector of the economy, Chile did not even own the means of buying itself out of economic bondage.<sup>60</sup>

Both Charles Pregger Román and Roger Burbach also support the dependency thesis. The former argues that the formation of corporations permitted one economic element to penetrate and eventually dominate other sectors of the economy. Once in power, these corporate interests, in conjunction with their British allies, refused to industrialize Chile and emphasized instead the export sector and the importation of manufactured goods. Even the Great Depression and subsequent program of economic nationalism did not end the dependency. Burbach claims that foreign capital avoided the tariff barrier by buying into existing Chilean industries. The national bourgeoisie permitted this, in part, because it needed advanced technology and capital. Hence, in return for a "piece of the corporate action," Chileans opened the door to foreign domination.<sup>61</sup>

The dependency model, however, suffers from certain flaws that become evident as new research is published. S. F. Edwards indicates that as early as 1811, Chile sought to alter its economic structure. The government encouraged the development of national industries—especially textiles—as well as a merchant marine; it limited foreign traders while giving Chilean commercial interests certain advantages; and it sought to stimulate agriculture. These measures failed for a variety of reasons. Local merchants could not compete successfully despite their advantages. The greatest problem was that the Chilean economy

could not simultaneously reform itself and generate enough income to sustain the government and support the war for independence. Customs provided the lion's share of the nation's revenues and any measure that restricted them strangled government services. John Rector reaches similar conclusions and argues that neo-mercantilism simply spawned inefficient industries producing high-cost goods while diverting needed resources from agriculture and mining. Raw material production at least generated funds for the support of the government and eventual growth.<sup>62</sup>

In the 1870s, Chile enacted a protectionist *aduana* code and compensated for the lost revenues by imposing a tax on income, gifts, and inheritances.<sup>63</sup> Native industries did develop and, as Henry Kirsch notes, these manufacturers provided enough to satisfy much of Chile's consumer and military needs during the War of the Pacific.<sup>64</sup> The legislature subsequently passed additional protectionist laws that enjoyed the support not only of industrialists but also the hacendados, who saw the tariff as a means of defending their beef and wheat markets. The Santiago riots of 1905 indicate, however, that higher domestic food prices antagonized the public.<sup>65</sup>

Domestically produced items were often nondurable goods that were consumed locally; others, such as sulphuric acid, cement, railway bridges, and locomotives, contributed to the growth of heavy industry. Chilean manufacturers became strong enough to satisfy local needs during the First World War. As Oscar Muñoz notes, the onset of the depression and the Second World War provided additional incentives that, in conjunction with a policy of import substitution, stimulated the nation's heavy industry and metallurgical sectors. Admittedly, domestically produced goods were more expensive, but at least they bore the message: "fabricación chilena."<sup>66</sup>

Significantly, the nation's transportation system did not languish. Robert Oppenheimer demonstrates that private Chilean capital and the government financed the construction of the Central Valley rail system. Eventually the Moneda had to assume the administration of this endeavor, making Chile the first Latin American nation to control its own railroads. Oppenheimer's work is also important because he shows that the hacendados comprised the largest segment of the shareholders of railroad stock, thus putting to rest the thesis that the agriculturalist was not innovative. John Whaley's excellent dissertation traces the impact of the railroad on Chile's south. While the rail system opened up the *frontera* for settlement, the author argues that it also destroyed local industries and thus subordinated the south to the domination of the Central Valley, particularly Santiago.<sup>67</sup>

While the dependency theory may have some appeal, it is often misleading. As Harold Blakemore notes, Chile was simply not that helpless. Even at the apogee of British power, Santiago successfully refused to accept financial responsibility for Peruvian guano debts, one of the unwanted dividends of the War of the Pacific.<sup>68</sup> The Chilean capitalist, moreover, was neither hesitant nor incompetent: he opened up trade routes to Australia in the early nineteenth century; and Chilean smelters imported ores from Bolivia, Peru, and Argentina, which they refined and exported.<sup>69</sup> Jay Kinsbruner demonstrates that English

merchants, initially at least, did not monopolize commerce and that their commercial success was due to their skills and not the intervention of the British government. Indeed, not all of the foreign enterprises resulted in profit: the great William Wheelwright, as Kinsbruner and Roland Duncan show, failed on more than one occasion in his ventures in Chile.<sup>70</sup>

New research indicates that Chile constructed an adequate economic foundation in the nineteenth century but that it failed to modernize. Kirsch claims that Chilean capitalists hesitated to invest in new technology, and industries stagnated because their money flowed instead into short-term, high-profit enterprises rather than heavy industry. Thus, many Chileans invested capital in Bolivian mines and Argentine *estancias* because they produced a higher return on their investment.<sup>71</sup>

Markos Mamalakis' most recent study also notes that Chile developed substantially during the nineteenth century but could not meet the needs of its expanding population. Chile faltered because the government failed to impose a rational tax system that could have invested the revenues in education and diversifying the economy. Mamalakis effectively demonstrates that the impact of foreign investment and inflation has been over emphasized. He argues instead that the Central Valley, which developed because of the tax on mining, never contributed to the growth of the rest of the nation. Unlike Carmagnani, he believes that there was adequate capital accumulation but that it was consumed, not invested in the economy. Subsequently, after the easy money of nitrates had evaporated, the various sectors had to compete for a diminishing share of resources, thus limiting the nation's economic growth. The author, an economist, has provided us with a superb exposition describing Chile's economic development through the twentieth century and including the government of Allende.<sup>72</sup>

Some historians offer alternative explanations for Chile's economic problems. Pierre Vayssiere, for example, claims that Chile owes its underdevelopment not to dependency but to its fiscal system. Soon after Independence, the new nation lost its gold and silver, which was remitted abroad to pay for the purchases of European consumer goods. The nation literally had run out of specie—the government had to mint copper coins and private companies started the infamous system of *fichas*—thus stunting, if not suffocating, economic development. After 1850, when the economy began to expand, so did the demand for specie; unfortunately, Chile's mineral production began to decline. Finally, the state, in the name of Liberalism, abandoned control of the money supply to private credit institutions that began to print banknotes. Local capitalists invested this "funny money" not in the economy, but in maintaining a pretentiously high standard of living.<sup>73</sup> Carmagnani also criticizes the government because it permitted foreign banks to siphon off capital from the more dynamic sectors; these funds went to finance ventures that, while lucrative, did not benefit the Chilean economy.<sup>74</sup> Two recent doctoral dissertations also study various aspects of the nation's monetary policy.<sup>75</sup>

Many find it difficult to accept any generalized interpretation of Chile's economic development. S. F. Edwards maintains that we cannot formulate such theories because of the paucity of literature on the basic sectors of Chile's eco-

nomically. Happily, various scholars have embarked upon research projects that will provide us with the necessary data. One of the more gratifying examples has been the study of the nitrate industry. Oscar Bermúdez supplements his comprehensive book on salitre with an article describing how Chile regulated the nitrate fields in occupied Atacama and Tarapacá. Thomas O'Brien's painstaking efforts show that Santiago returned the nitrates to private hands because of conflicting claims of ownership and because it could ill afford to finance both the War of the Pacific and the redemption of the Peruvian nitrate certificates. Subsequently, foreign control increased because Chilean capitalists preferred to invest their funds in more traditional sectors of the economy, sure that the profits of a revived nitrate industry would eventually percolate into their hands. Michael Monteon provides an overview of British economic involvement in the Atacama nitrate industry from the 1870s until the 1891 revolution.<sup>76</sup>

Ricardo Couyoumdjian's superb article in *Historia* shows that while World War I increased consumption of nitrates, Chilean miners lacked the means to ship their products to Europe. Although Chile retained a monopoly over the salitreras, the Allies could and did force down the prices by restricting the sale of needed raw materials, particularly oil. Increasingly, the Chilean government became involved in the regulation of the nitrate trade. When the war ended, prices fell; the postwar depression, plus the Haber process, signaled the close of the golden age of nitrates, an era that was not to be revived despite the efforts of the Guggenheims and their magical process. Of course, for some the demise of the salitreras produced no mourning. As Monteon, Reyes, and the Bermúdez study of Nicolás Palacios demonstrate, working conditions in the northern nitrate fields were unbearable and the decline of the salitreras ended a sad era in Chilean labor history.<sup>77</sup>

Foreigners played an important role in developing Chile's copper as well. Claudio Véliz studies the Alsatian Charles Lambert, who made it possible to smelt high sulphate ores; and Pierre Vayssiere notes that foreigners, this time Americans, resurrected the moribund copper industry when the Chileans chose not to invest in this sector of the economy. This infusion of funds and new technology made the mine pits more productive. The Gran Minería complex escaped taxation until 1931 when, at the onset of the depression, the government began to levy imposts on the red metal. This change in fiscal policy—in the sense that copper replaced nitrates as the object of taxation—later was altered to encourage additional investment by the copper companies. According to Clark Reynolds, however, the revenues generated by copper supported general government expenditures, not the diversification of Chile's economy.<sup>78</sup>

The favored status of the copper companies excited hostility, and even right-wing politicians like Mariano Puga attacked the Yankee organizations and demanded their expulsion. In 1971, the Allende government expropriated the Gran Minería. Two American scholars have studied the mechanics of nationalization as well as its background and results. George Ingram argues that most Chileans, not just the Left, believed that the nation had to break out of the cycle of dependency imposed upon it by foreign natural-resource exploiters. Theodore Moran, whose work attempts to study the broader issue of the relationship of

the multinational corporation and the host country, claims that the American Alliance for Progress demands for land reform so angered the Right that they ceased to protect the copper companies from the Chilean Left.<sup>79</sup> Both works provide the reader with a general understanding of the nationalization process.

Some general studies on mining have also appeared. Leland Pederson has written an excellent work tracing the exploitation of the Norte Chico's mineral resources from the Spanish conquista to the modern period. An interesting companion piece is the somewhat superficial but still useful effort of Augusto Bruna, who traces the evolution of Chile's mining codes from their Roman Law background into this century.<sup>80</sup>

Recent efforts have substantially increased our understanding of Chile's agrarian sector. Arnold Bauer, Horacio Aránguiz, and others do an excellent job of describing the least visible and yet most discussed Chilean: the *inquilino*.<sup>81</sup> There are also studies of individual *fundos* that employed these hapless *campesinos*.<sup>82</sup> Gonzalo Izquierdo traces the evolution of the Sociedad Nacional de Agricultura from an organization praising the virtues of agrarian life to a force for modernizing the agricultural sector through the introduction of new technology.<sup>83</sup> As Silvia Hernández notes, these efforts produced positive results after 1850, largely because of the expansion of Chile's European markets, the introduction of the railroad, the development of internal markets, and the efforts of enlightened miners and entrepreneurs turned hacendado. The importation of new farm machinery tended to be somewhat limited because few Chileans could repair this equipment.<sup>84</sup> The National Society of Agriculture eventually became not only a force for modernization but also a pressure group operating in the political system to protect the interests of the large landowner.<sup>85</sup> Two worthwhile reprints have also appeared: the classic two-volume study of Claudio Gay, and Donoso's monograph on Chile's southern provinces.<sup>86</sup>

Arnold Bauer has attempted to write a definitive study of Chilean rural society from the Spanish Conquest to the twentieth century. His research, however, tends to be based upon the experience of two *departamentos*—Talca and Caupolicán—and for a more limited time period (1840–90). While Chile's agricultural sector was initially competitive, its participation in the world market failed because of the nation's geographical position, because its rivals mechanized more rapidly, and because the *terratenientes* lacked the foresight or desire to improve their *fundos*, apparently because they were under no economic pressure to change. The landowners, who monopolized the credit extended by the Caja de Crédito Hipotecario, evidently refused to invest these funds in their haciendas but instead wasted them in extravagant living. Bauer's work is quite provocative, but its conclusions, because they are based upon a limited range of sources, are tentative.<sup>87</sup>

Mario Ballesteros indicates that Chilean agriculture did increase its productivity in the early twentieth century although it began to decline after 1930;<sup>88</sup> by the 1950s it had become one of the nation's least productive sectors. Chile's problem was twofold: it contained too little arable land and what did exist was concentrated in the hands of an absurdly small elite. Earlier attempts to provide the *inquilinos* with land in the newly opened southern frontiers had failed,<sup>89</sup>



and the salitreras provided one of the few alternatives to tenant farming. After World War I, however, the salitreras ceased to employ large numbers of men, who then drifted back to the farm in search of work.

The desire for reform began as early as 1911 when *inquilinos* protested their working conditions. Although the Ibáñez regime provided that its Labor Code protect agrarian workers, the *terratenientes* prevented its implementation through parliamentary maneuvering. As Brian Loveman's splendid study indicates, the political power of the landowners and their ability to buy off the Left, by supporting the latter's programs for industrialization and subsidized food prices for the urban worker, stymied land reform. By the 1960s, the *hacendado's* prestige and power had waned. Unable to produce enough to feed the nation and considered a regressive force in a society that sought to modernize its economy, the *terratenientes* lost support. Agrarian reform, long a dream, became a reality as Alessandri, Frei, and especially Allende eradicated the large landed estates. As Loveman notes, however, political and ideological issues complicated the land reform process.<sup>90</sup>

Scholars are also studying the formation and growth of the industrial proletariat; unfortunately, most of the material on the labor movement tends to be doctrinaire. Jorge Barriá's studies are general, although his history of CUT is useful for tracing the formation of the union and its various conferences. Alan Angell's volume provides a historical background to the labor movement, but tends to stress union organization and internecine strife within various syndicates. He notes that Alessandri's labor code did not serve the working class well by creating separate unions for the *obrero* and *empleado*; by not allowing unions to be organized on an industry-wide basis; and by regulating too strictly their finances. Michael Monteon's dissertation and the work of Enrique Reyes focus on the plight of the nitrate worker. Monteon, who does a very good job of describing conditions in the salitreras, faults Recabarren for failing to develop a more dynamic union movement. Reyes argues that the inhuman working conditions fused disparate workers into a class-conscious proletariat and hence the nitrate experience was essential to the development of the Chilean labor movement.<sup>91</sup>

Chile adopted the same social institutions as other Latin American colonies, at least initially. For example, the *encomienda* was institutionalized, although Mario Góngora notes that it was not a feudal instrument because the landowners, while enjoying Indian service, were still subject to royal authority. Chile's *encomiendas* thus have been described as "quasi-seigneurial" because they lacked an inherent political force and derived their authority from the King.<sup>92</sup> However, this did not stop the *encomenderos* from dominating Santiago's *cabildo* and through it, the urban economy, to fit their own needs.<sup>93</sup> María González Pomes argues that the *encomienda* functioned in a benign fashion in Chile, in part because of the intervention of the civil authorities; when it was abolished, in 1791, most of the laborers remained on the land as tenants.<sup>94</sup> Still, the relationship between landlord and tenant was obviously unequal: the latter was subordinated to the needs of his master and rarely received specie for his labor.<sup>95</sup> Those who

could find no work—vagabonds, migratory workers, thieves—often congregated on the southern frontier or in Cuyo, where they were joined by other disorderly elements who had no chance to improve themselves socially and who had been displaced from the labor market by lower-class blacks and Indians. The migratory and landless unemployed posed a constant threat to society and were considered a force for immorality. Consequently, the government sought to curtail their activity, often by employing them on public works projects.<sup>96</sup>

The Chilean aristocracy was not as homogeneous as has been believed nor was it closed to outsiders.<sup>97</sup> Class depended upon a variety of components and the possession of an *encomienda* was not always the prerequisite for entry into the upper class. Increasingly, race became a condition for social acceptance, while one's profession, providing it was not "*un oficio vil*," became less important.<sup>98</sup> Only in the more traditional mining centers did the *encomienda* seem to be essential; in Santiago and Concepción, elites emerged whose control was based upon power and wealth, not Indian labor. These new elements began to occupy important posts in the colonial bureaucracy; however, this social mobility did not come easy nor was the newcomer graciously accepted by the old guard.<sup>99</sup> Although the nineteenth-century elites continued to permit new elements to join their ranks, they demanded that they adopt their ideals and goals.<sup>100</sup>

Preoccupation with the oligarchy has tended to make scholars ignore the lower class, but some work on Chile's racial composition and demographic movements has appeared.<sup>101</sup> Immigration history and the contribution of various ethnic groups has also become a popular topic. Carl Solberg was one of the first to undertake such research, comparing the immigration patterns and government policies of Argentina and Chile from 1880 to 1914. Marcello Segal has written a highly ideological work attempting to describe the role of the Chinese in Chile; and Victor Dalhl studied the Yugoslavs, who initially settled either in Magallanes or Antofagasta, and became an important element in Chile, especially after they began to migrate to Santiago.<sup>102</sup>

Perhaps the most significant study has been that of Jean Pierre Blancpain, who has written a massive opus describing the German immigrant experience from 1816 to the conclusion of World War II. This work is epic in its scope and outlines the social, economic, and cultural impact of the Germans in Chile. George Young has also studied the Teutonic influence, providing us with a biography of Bernardo Phillipi, author of the first colonization project, and a study of the German community from 1846 to 1914.<sup>103</sup>

In local studies, scholars have described various cities in Chile's north and south as well as the Santiago region.<sup>104</sup> A few works focus on more specific projects: Hernán Rodríguez and Fernando Campo trace the evolution of certain sections of land in Santiago and Maule respectively; Armando de Ramón describes every *bien raíz* in Santiago, as well as tracing its ownership and value, from 1650 to 1700.<sup>105</sup> Others have made regional studies of Magallanes, Chiloé, and the southern provinces.<sup>106</sup> These are excellent research projects of regional development in Chile, and any interested scholar should not only consult them but also the comprehensive bibliography of Leonardo Mazzei.<sup>107</sup>

Scholars have expended a disproportionate amount of their efforts describing Chile's diplomatic history, but not always with the desired results. Many of these works have tended to decry the loss of Chilean territory to its neighbors, particularly Argentina. Perhaps the most efficient, if not verbose, practitioners of this school are Oscar Espinosa and Ezequiel González, who have each written three volumes arguing that the Moneda betrayed Chile by ceding Patagonia and other territories to Buenos Aires.<sup>108</sup> This school of historiography has many devotees, most of whom share this pessimistic theology.<sup>109</sup> There are some more specific works on Argentine-Chilean relations: Geoffrey Smith studies the role of Balmaceda in keeping Argentina neutral during the War of the Pacific; Orrego Vicuña laments that with Balmaceda's death, Chile ceased to follow an aggressive and nationalistic foreign policy vis-à-vis the *porteños*.<sup>110</sup>

A variation of this irrendentist movement is a group that writes that Chile foolishly permitted Bolivia to regain what it had lost in the War of the Pacific. Espinosa, in an openly racist account, argues that Bolivia never possessed a seacoast and that its present attempts to gain an outlet to the Pacific are without merit. Fortunately, there are more balanced studies of Chilean-Bolivian relations, for instance, that of Ximena Rojas, who has written an excellent biography of Adolfo Ibáñez, Chilean foreign minister prior to the 1879 conflict.<sup>111</sup>

Because of so many pressing border problems, it is not surprising that few have studied Chile's relations with noncontiguous countries: Jorge Edwards writes on Franco-Chilean relations in the early nineteenth century; Mario Barros describes the Eastman mission to Quito.<sup>112</sup> There is some solid research relating British attempts to resolve Chile's boundary disputes with Argentina during the Montt and Riesco governments.<sup>113</sup> Some historians focus on Chile's relations with the United States: Eugenio Pereira Salas does a splendid job relating how American traders and sailors first made contact with colonial Chile and how the United States revolution influenced Chile's struggle for independence; Mary Squella studied the 1829–41 period, concluding that the United States was too pro-Confederation during the 1835–38 war; and Vladimir Smolenski, a Russian historian, tries to blame the War of the Pacific on American intervention, but fails to convince the reader. A more satisfying effort is that of Patricio Estellé who shows that the real cause of the Baltimore incident was not the rowdy behavior of some drunken American sailors but the ill-fated support of the United States for the Balmaceda regime.<sup>114</sup> Chile's diplomats again became involved with the Yankees when they acted as one of the three Latin American mediators during the Mexican Revolution.<sup>115</sup> Later policy, particularly that of the Hoover administration, shows that the United States had become more sensitive to Chilean feelings,<sup>116</sup> although during the Second World War, Americans did not hesitate to use pressure to force the Chileans to break with the Axis.<sup>117</sup>

Chile's relations with its former colonial master have also been the subject of some recent research. One author argues that Spanish miscalculations precipitated their 1860 war with Chile and that intervention of this type had never

been Madrid's intent.<sup>118</sup> Chile did not participate in that struggle with Spain out of some commitment to Americanism. If such a belief existed, it was confined to a small group who favored the political union of Latin America but who believed that Chile's independence depended upon the territorial integrity of its neighbors.<sup>119</sup>

During the past decade, two particularly valuable diplomatic histories have appeared. The first is the work of Mario Barros, a member of the staff of the Ministerio de Relaciones Exteriores, who has written an overview of his nation's diplomatic relations from the colonial period to the Popular Front. Although the bibliography may have missed a few items, Barros does an excellent job covering periods, particularly in the twentieth century, which have often been neglected, if not ignored.<sup>120</sup> Robert Burr's prize-winning *By Reason or Force* is more analytical and clearly demonstrates that early in its history Chile had adopted a foreign-policy goal of asserting its hegemony over Latin America's Pacific Coast. Burr shows that Chile accomplished this by developing a series of alliances with other nations although it did, on occasion, also employ military power to obtain its objectives.<sup>121</sup> *By Reason or Force* has not only survived recent criticism, it has been expanded upon by the English diplomatic historian Michael Varley.<sup>122</sup>

Because of the recent coup, the Chilean military has again become a fashionable topic for study. Perhaps the foremost authority is Frederick Nunn, who has written a variety of articles as well as two books dealing with the Chilean army. The first monograph concentrates on civil-military relations in the early twentieth century. Nunn argues that a desire to restructure Chilean society, combined with the wish for professional reforms, catapulted the military into politics in 1924. Once the Altamirano junta began to support the Right, however, the junior officers—Blanche, Ibáñez, and Grove—turned on their commanders and restored Alessandri to the presidency. The latter refused to tolerate military meddling in government and resigned in 1925. His successor, Emiliano Figueroa, was a weak leader and the increasingly aggressive Ibáñez forced him to resign when he and the other civilians seemed incapable of resolving Chile's problems. Ibáñez ruled until the Great Depression forced him to quit power in 1931. While clearly authoritarian, Ibáñez still accomplished a great deal and instituted numerous reforms; but although efficient, his regime lacked political support and hence could not sustain itself when the American loans dried up and the economy faltered.

Nunn's second book, emphasizing civil-military relations in the nineteenth century, seems strongest when tracing military involvement in post-1930 politics. Following the overthrow of the Socialist Republic, the military returned to its professional tasks although occasionally some officers did seek to inject themselves into politics. The military did not return to the political arena until the 1970s, overthrowing Allende in 1973. Nunn argues that this seizure of power was partially the result of Allende's own policies: he had invited the generals and admirals into his government. Making the officer corps share responsibility for government policy did not wed them to the Unidad Popular. On the contrary, the military saw themselves hated by their own social class while they became

disenchanted, first by Allende's policies and then by the threats to the sanctity of the military hierarchy. Cohesion within the ranks of the regulars seemed to grow while civilian politicians bickered among themselves. Aware that they had become, by default, the most powerful element in Chile, and displeased by the Allende government, they turned on their commander-in-chief.<sup>123</sup> Like the parable of the Arab and the camel, the guest had evicted the host.

Not all scholars share Nunn's conclusions. Liisa North argues that a campaign of subversion launched by the U.S. and the Chilean Right, coupled with the failure of Allende to purge the army of conservatives, encouraged the military to rebel. Jorge Nef, on the other hand, claims that the military had never renounced intervention; indeed, the officers consistently meddled in politics after 1932, particularly if they considered the civilian government too liberal. Unfortunately, Allende did not realize this. By inviting the military to hold ministerial portfolios, he gave the officers a power base within the government. The armed forces quickly became the masters not the guests because the Allende government could neither neutralize them nor force them to obey civilian leaders. Alain Joxe, a French sociologist, had earlier indicated that such a coup was not unexpected: the largely middle-class officer corps relied upon the government for its subsistence and hence did not fear the growth of an activist state; on the contrary, the officers might seize power to protect their own interests, particularly if encouraged by foreign capital.<sup>124</sup>

Those who wish to study the less theoretical and instead concentrate on strictly military history, should consult the excellent three-volume work published by the Estado Mayor del Ejército, and the good two-volume atlas by Toro Dávila. The navy, so long neglected by scholars, is studied by Carlos López whose work, while extremely nationalistic, provides a first-rate overview of the fleet's activities.<sup>125</sup>

Chile's educational system has been analyzed from the colonial period to the twentieth century,<sup>126</sup> but of particular merit is a series of interpretative essays by Julio César Jobet, who argues that the educational system was used to buttress the status quo and that it prevented the dissemination of a values system needed to survive in an increasingly technical society.<sup>127</sup> Other scholars disagree, noting that educators did modernize the pedagogical system. Indeed, to accomplish this goal, textbooks and other teaching materials were used not only to introduce new Liberal ideologies in the nineteenth century but also to stress economic nationalism and reform in the twentieth as well.<sup>128</sup>

Peter Sehlinger provides a short biography of Valentín Letelier, a leading intellectual and politician, as well as an excellent annotated bibliography of his works.<sup>130</sup> Various historians concentrate on José Victorino Lastarria.<sup>131</sup> Alberto Varona has done an excellent job dealing with the ideas of Francisco Bilbao, explaining not only his activities in Chile but his subsequent intellectual development. Solomon Lipp also studies Bilbao, Letelier, and the twentieth-century educator-philosopher, Enrique Molina. Molina's memoirs dealing with Alejandro Venegas, author of the famous *Sinceridad: Chile íntimo 1910*, appeared recently.<sup>132</sup>

Intellectual historians have also devoted substantial efforts to amassing bibliographies. By far the best guide to published material is Guillermo Feliú Cruz's *Historia de las fuentes de la bibliografía chilena*. The initial tome deals with the influence of historical studies in Chile and analyzes the efforts of Spanish and Creole colonial historians. Volume two critiques Chile's pre-eminent historians: José Toribio Medina, Ramón Briceño, Benjamin Vicuña Mackenna, and Diego Barros Arana. The remaining books describe the efforts of other historians and bibliographers. Despite the somewhat unusual format—the authors discussed are organized by decade of birth rather than their speciality—this is an essential work for any historian.<sup>133</sup> Another important study is that of Ramón Briceño, whose comprehensive three-volume effort tries to cite every book and *folleto* published in Chile from 1812 to 1876.<sup>134</sup> Additional bibliographies, often annotated, have appeared dealing with economics, clerical issues, the left-wing press, traveler accounts, and topics such as the movement for independence, the Patria Vieja, regional studies, and the historical novel.<sup>135</sup>

The works of specific historians have also been analyzed. Feliú has written on the French naturalist-historian Claudio Gay as well as editing Gay's interviews with various independence-period figures. Gertrude Matoyoka's dissertation provides an interesting study of the work of Chile's pre-eminent nineteenth-century historian, Diego Barros Arana. Perhaps the most controversial work is Ricardo Donoso's two-volume diatribe against Francisco Encina. Donoso, an intellectual iconoclast who seems happiest when flaying exalted personalities, proves that Encina borrowed liberally from others, particularly Barros Arana, without citing his sources. Feliú, on the other hand, has written a more positive account, describing Encina's involvement in politics, which, he argues, led him to write his famous *Nuestra inferioridad económica* and *La educación económica y el Liceo*. Feliú claims that Palacios and Venegas influenced Encina's historical development more than Barros Arana. The Feliú biography also contains an excellent bibliography of all of Encina's works as well as his historiographical studies. Jobet has also written a series of essays on Chilean historiography. The Socialist historian tends to be slightly ideological in his approach, although he does not laud all left-wing books. Not without reason, Jobet also labels Encina a racist and a reactionary while approving heartily of Donoso's exposé. As Allen Woll's dissertation demonstrates, however, nineteenth-century Chilean historiography has been characterized by intense economic, religious, and ideological struggles, and even those who sought to purge it of such prejudices often themselves fell victim to their influence.<sup>136</sup>

If the intellect has flourished during the past decade, spiritual issues have been largely ignored. Some material has appeared praising the Church as a defender of the Indian and describing colonial clerics and their property.<sup>137</sup> Fidel Araneda's *Breve historia de la Iglesia en Chile*, true to its title, is short but not very illuminating. The work of the Society of Jesus in colonial and modern Chile is analyzed by Walter Hanisch, S.J.<sup>138</sup> Clearly, the Church's power diminished as the nineteenth century progressed. A joint seminar paper demonstrates that the state ceased to support missionary activity among the Indians.<sup>139</sup> Reduced government support did not smooth the road to tolerance, however, and early

attempts by dissidents to obtain religious freedom encountered serious resistance.<sup>140</sup> Eventually, however, the hierarchy accepted change and began to advocate first paternalistic reforms and later, with the growth of the Christian Democratic party, new ways of restructuring Chilean society.<sup>141</sup>

Despite the accomplishments of the past eleven years, much remains to be done. It would be refreshing for nineteenth-century specialists to study some topic besides Balmaceda. The period 1833–91 deserves more attention and the presidential regimes of Montt, Pérez, and their successors are sorely in need of additional investigation or revision. On the other hand, the dispute over Balmaceda will never be resolved until someone carefully analyzes his administration, tracing the tortuous events that precipitated the 1891 civil war. But for the Heise book, the various parliamentary governments have been the object of much scorn and little research. The 1891–1924 period may indeed have been bereft of competent government but no one has studied systematically a parliamentary presidency. Since preliminary research indicates that these governments were not as blasé as originally believed, we should turn our attention to this critical era.

The post-Alessandri period is extremely important and yet it, too, is almost untouched. But for a few dissertations, we know little about the 1920s and 1930s and virtually nothing about the post-1940 decades. Those working in this period would be able to benefit from interviews with the various participants and policymakers. The same lack of direction characterizes economic history. We still do not have a collection of basic economic data—although apparently Markos Mamalakis is editing such a study—let alone comprehensive works describing basic industries such as copper or the various components of the industrial sector.

In a nation whose oligarchy is the subject of substantial abuse, we still do not know who composed the Chilean elite or what it possessed. Collecting such information would be an arduous task yet it is essential to understanding Chile's political, social, and economic development. As the recent study of Robert Oppenheimer indicates, the results of such work can destroy some of our most cherished misconceptions about Chile.

Despite these omissions, the past years have yielded invaluable material. The Blakemore study on Balmaceda, the pioneering effort of Heise, and an increasing emphasis on the 1920s and 1930s have widened our knowledge of Chile's political development. In the area of economics and diplomacy, scholars like Carmagnani, Mamalakis, Jobet, and Burr have sought to bring new perspectives and to formulate general theories. Each area of historical study has benefited from the work of new scholars who have provided insight and additional knowledge. These intellectual efforts have set new standards and opened new horizons to those of us who have dedicated our efforts to understanding Chile and its past.

NOTES

The following abbreviations designate often-cited journals and books. Unless otherwise noted, all books cited are published in Santiago, Chile

AHR— <i>American Historical Review</i>	IAEA— <i>Inter-American Economic Affairs</i>
BACH— <i>Boletín de la Academia Chilena de la Historia</i>	JIAS— <i>Journal of Inter-American Studies and World Affairs</i>
C— <i>Caravelle</i>	JLAS— <i>Journal of Latin American Studies</i>
CAL— <i>Cahiers des Amériques Latines</i>	M— <i>Mapocho</i>
EHIPS— <i>Estudios de Historia de las Instituciones Políticas y Sociales</i>	RCHD— <i>Revista Chilena de Historia y del Derecho</i>
H— <i>Historia</i>	RCHG— <i>Revista Chilena de Historia y Geografía</i>
HAHR— <i>Hispanic American Historical Review</i>	TA— <i>The Americas</i>
HGFC— <i>Homenaje a Guillermo Feliú Cruz</i> (Santiago, 1973)	

1. Sergio Villalobos et al., *Historia de Chile* (1974–76).
2. Jaime Eyzaguirre, *Historia de Chile*, 2d ed. (1973). See also *Historia de las instituciones políticas y sociales de Chile* (1970), a textbook to be used in conjunction with *Fisonomía histórica de Chile*.
3. Luis Vitale, *Interpretación marxista de la historia de Chile*, 3 vols. (1967–71). For another Marxist interpretation, see also Julio César Jobet's "Significado de la revolución de la Independencia," in his *Temas históricos chilenos* (1973), pp. 153–98. Ranquil's *Capítulos de la historia de Chile* (1973) is a one-volume study, designed "expresamente para la clase trabajadora," which is highly political and more valuable as a propaganda piece than an historical work.
4. Jay Kinsbruner, *Chile: An Historical Interpretation* (New York, 1973). For other synthetic works see: Francisco Moreno's *Legitimacy and Stability in Latin America. A Study of Chilean Political Culture* (New York, 1969); Guillermo Feliú Cruz, "Patria y Chilenidad," *M* 5:1(1966):157–75. Richard Gray and Frederick Kirwin, "Presidential Succession in Chile: 1817–1977," *JIAS* 11(1969):144–59 compare Chilean and American presidents.
5. Hernán Godoy, *Estructura social de Chile* (1971).
6. Lia Cortés and Jordi Fuentes, *Diccionario político de Chile* (1967) and Salvatore Bizzaro *Historical Dictionary of Chile* (Metuchen, N.J., 1972).
7. Fernando Silva Vargas, "Esquema de la Hacienda Real en Chile indiano (Siglos XVI y XVII)," *RCHD* 4(1965):208–50 and his "Una visita a la Real Hacienda de Chile en el siglo XVI," *BACH* 77(1967):190–205; Della M. Flusche, "City Councilmen and the Church in Seventeenth-Century Chile," *Records of American Catholic Historical Society of Philadelphia* 81:3(1970):176–90, and "The Cabildo and Public Health in Seventeenth-Century Chile," *TA* 29(1972):173–90; Fernando Aliaga R., S.S. "La relación diocesana de visita 'Ad Limita' de 1609 del Obispo de Santiago de Chile," *H* 5(1966):105–65; and Eugene Korth, S.J., *Spanish Policy in Colonial Chile: The Struggle for Social Justice, 1535–1700* (Stanford, Calif., 1968).
8. Fernando Silva Vargas, "La Contaduría Mayor de Cuentas del Reino de Chile," *EHIPS* 2(1967):103–81; "Perú y Chile, notas sobre sus vinculaciones administrativas y fiscales," *H* 7(1968):147–203; and "La visita de Areche en Chile y la subdelegación del Regente Alvarey de Acevedo," *H* 6 (1967):153–91; Carlos Ugarte, "El Cabildo de Santiago y el comercio exterior del Reino de Chile durante el siglo XVIII," *EHIPS* 1(1966):5–43; Jacques A. Barbier, "Elite and Cadres in Bourbon Chile," *HAHR* 52(1972):416–36 and "Imperial Reform and Colonial Politics: A Secret History of Late Bourbon Chile," Ph.D. dissertation, University of Connecticut, 1973.
9. Gonzalo Vial, "La formación de las nacionalidades hispanoamericanas como causa de la independencia," *BACH* 75(1966):110–45 and "Historiografía de la Independencia de Chile," *Revista de Historia de América* 59(1965):256–80; Walter E. Hanisch, S.J., "Los jesuitas y la independencia de América y especialmente de Chile," *BACH*



- 82(1969):13–77; Néstor Meza Villalobos, “La permanencia de la monarquía como problema político del reino de Chile desde la constitución de la primera Junta de Gobierno en 18 de septiembre de 1810, hasta la disolución del primer Congreso Nacional, en 15 de noviembre de 1811,” *Anuario de Estudios Americanos* 29(1972):637–63.
10. Simon Collier, *Ideas and Politics of Chilean Independence, 1808–1833* (Cambridge, 1967).
  11. Mary L. Felstiner, “Kinship Politics in the Chilean Independence Movement,” *HAHR* 56(1976):58–80 and Roger Haigh, *The Formation of the Chilean Oligarchy: 1810–1821* (Salt Lake City, Utah, 1972). Manuel Reyno Gutierrez, “La Patria Vieja no se perdió en Rancagua,” *RCHG* 143(1975):153–71 downplays the theme of rivalry between O’Higgins and Carrera.
  12. Raúl Silva Castro, *Asistentes al Cabildo Abierto de setiembre de 1810* (1968).
  13. Manuel Salvat M., “El delito de infidelidad a la Patria. Apuntes en torno al caso de los desterrados chilenos en Juan Fernández, 1810–1817,” *H* 8(1969):463–88.
  14. Jaime Eyzaguirre, “La conducta política del grupo dirigente chileno durante la guerra de la Independencia,” *EHIPS* 2(1967):227–71.
  15. Ricardo Krebs, “La independencia de Chile en el pensamiento de Manuel de Salas,” *BACH* 75(1966):145–55 and Manuel Salvat M., “El delito de infidelidad a la Patria. Un caso chileno,” *BACH* 87(1973):17–39.
  16. Julio Retamal F., “El Cabildo Eclesiástico de Santiago en los prolegómenos de la Independencia de Chile,” *H* 6(1967):285–317.
  17. Horacio Aránguiz, “La aplicación de la Constitución de 1818,” *EHIPS* 1(1966):121–49; Guillermo Donoso V., “Acotaciones en torno a la Declaración de la Independencia de Chile,” *HGFC*, pp. 199–256; Zenón Urrutia, “Un decenio del Cabildo penquista (1818–1828),” *HGFC*, pp. 973–1038; Gabriel Guarda, “Reprecusión en Chile de la Independencia del Perú,” *BACH* 85(1971):121–29; Javier González, “Notas sobre la regulación jurídica de la Expedición Libertadora de 1820,” *BACH* 85(1971):105–19; and Alamiro de Ávila Martel, “Presencia de Bolívar en Chile en 1819,” *BACH* 85(1971):39–77.
  18. Juan Eduardo Vargas C., “El pensamiento político del grupo estanco, 1826–1829,” *H* 9(1970):7–37.
  19. Javier González, “Un estudio de influencias doctrinarias en la Independencia: El concepto de diputado o representante popular,” *H* 6(1967):127–53.
  20. Collier, *Ideas and Politics*, p. 317.
  21. Sergio Martínez B., “El federalismo en Chile,” *RCHG* 138(1970):104–33.
  22. Jay Kinsbruner, *Diego Portales. Interpretative Essays on the Man and Times* (The Hague, 1967) and Errol D. Jones, “The Weight of the Night: Political, Economic, and Social Transformation of Chile, 1810–1830,” Ph.D. dissertation, Texas Christian University, 1971.
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  25. Patricio Estellé, “El Club de la Reforma de 1868–1871. Notas para el estudio de una combinación política en el siglo XIX,” *H* 9(1970):111–35.
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28. Julio César Jobet, *Ensayo crítico del desarrollo económico social de Chile* (1955); Hernán Ramírez Necochea, *La guerra civil de 1891* (1958); and Crisóstomo Pizarro, *La revolución de 1891* (1971).
  29. Harold Blakemore, "The Chilean Revolution of 1891 and Its Historiography," *HAHR* 45(1965):393–422 and *British Nitrates and Chilean Politics 1886–1896: Balmaceda and North* (London, 1974).
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  31. Raúl Silva Castro, *Balmaceda* (1969). For other works on Balmaceda see: Félix Miranda S., *Balmaceda, El hombre* (1973); Mario Correa Saavedra, "Personalidad íntima de Balmaceda," *Visión y verdad* (1972), pp. 9–61, which is a biographical study. Fernando Silva Vargas, *Pensamiento de Balmaceda* (1974). Numerous works containing the memoirs of those who participated in the Civil War have also been published: *Una familia bajo la dictadura* (Buenos Aires, 1972) as well as I. Valdés V.'s *La revolución de 1891* (Buenos Aires, 1970). In addition, numerous accounts of participants have appeared in periodicals.
  32. Julio Heise G., "El caciquismo político en el Periodo Parlamentario (1891–1925), *HGFC*, pp. 537–77.
  33. Juan Eduardo Vargas, "Notas sobre el pensamiento político de Pedro Montt," *EHIPS* 2(1967):271–99, and "Dos mentalidades políticas a comienzo de siglo XX: los partidos tradicionales y la tendencia nacionalista," *Revista de Ciencias Sociales* 8 (1975):193–214.
  34. Augusto Orrego Luco, "La cuestión social en Chile," was reprinted in *Anales de la Universidad de Chile* 119(1961):43–55. The article first appeared in *La Patria* (Valparaíso) in 1884.
  35. Fernando Silva Vargas, "Notas sobre el pensamiento social católico a fines del siglo XIX," *H* 4(1965):237–64 and Pedro Iñiguez I., *Notas sobre el desarrollo del pensamiento social en Chile, 1901–1906* (1968); James Morris, *Elites, Intellectuals, and Consensus* (Ithaca, N.Y., 1966). Jobet also deals with this topic in his "Apuntes relacionados con los orígenes de la 'cuestión social' en Chile," in his *Temas*, pp. 198–242.
  36. Horacio Aránguiz, R. Coydoudmjian [sic] and Juan Vargas, "La vida política chilena, 1915–1916," *H* 7(1968):15–89.
  37. Fernando Pinto L., *Crónica política del siglo XX* (1972) and Jorge Barria, *Chile en el siglo XX: un ensayo de interpretación histórica* (1967).
  38. Heise, *Historia*, pp. 295, 299, 301, 319, 357–59.
  39. Enrique Reyes, *El desarrollo de la conciencia proletaria en Chile* (n.d.).
  40. René Millar C., "Significado y antecedentes del movimiento militar de 1924," *H* 11(1972–73):7–103 and Frederick Nunn, *Chilean Politics, 1920–1931: The Honorable*

- Mission of the Armed Forces* (Albuquerque, N.M., 1970).
41. Raúl Aldunate P., *Revolución de los tenientes* (1970–71). See also Heise, *Historia*.
  42. George Strawbridge, "Military and Nationalism in Chile, 1920–1932," Ph.D. dissertation, University of Pennsylvania, 1968 and his "Ibáñez and Alessandri: The Authoritarian Right and Democratic Left in Twentieth-Century Chile," mimeographed (Buffalo, N.Y., 1971).
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