

Masks of Identity

Masks of Identity:
Representing and Performing Otherness
in Latin America

Edited by

Přemysl Mácha and Eloy Gómez-Pellón

**CAMBRIDGE
SCHOLARS**

P U B L I S H I N G

Masks of Identity: Representing and Performing Otherness in Latin America,
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The idea for this book first arose at the *54 Congreso Internacional de Americanistas - Construyendo Diálogos en las Américas* that took place in Vienna, Austria, in the summer of 2012. Researchers from all over the world gathered there to debate topics of interest, and Otherness was one of them. The Other as a topic of study, or rather, as a perspective of study, seemed to offer a great potential for new insights into the politics of identity and the evolution and dynamics of ethnic, racial, and gender relations. The outline of the book was further developed in November of the same year at the *I Congreso de Temas Americanistas* whose setting – the ancient city of Seville that served as the principal entry gate to Spanish America – provided an excellent environment for discussions about Otherness and the contents of this book. We would like to express our gratitude to the organizers of both events for making it possible for us to meet and discuss and develop the ideas presented in this book. We hope the readers will find at least some of these ideas stimulating and useful in their own research.

The writing of this book would also not have been possible without the kind support of our universities and institutions to which we also express our gratitude. Most importantly, however, we would like to thank our families for all the support they provided us during the time we spend in research and writing. To them we dedicate this book

INTRODUCTION

OTHERNESS IN LATIN AMERICAN HISTORY AND ANTHROPOLOGY

PŘEMYSL MÁCHA AND ELOY GÓMEZ-PELLÓN

Self-knowledge develops through knowledge of the Other.¹

If radical alterity did not exist, it would be anthropology's project to invent it.²

This collection of essays offers some thoughts on alterity/otherness in anthropological praxis viewed through the prism of the Latin American reality. It is neither an exhaustive treatment of the problem of Otherness in anthropological theory nor a definitive analysis of the various forms of represented, practiced, and contested alterities in Latin American history. Rather, the authors have been brought together by several common concerns. The first is the interest in exploring and understanding some of the ways in which Otherness structures social relations at the everyday as well as the national levels. The second is a theoretical and methodological question of how the perspective which foregrounds the Other at the expense of the Self might make the anthropological inquiry more effective and emancipatory. And third, we are interested in how we can, as researchers, teachers and citizens, help overcome cleavages which group identities constantly produce in the body of humanity.

We depart from the idea that many political and economic problems of a significant portion of the planet are, to a greater or lesser extent, the result of colonialism. Its legacy can still be felt across the Americas and particularly in Latin America. However, we agree with Cooper (2005) in that colonialism was an extremely complex and heterogeneous process that can only be properly understood in specific historical and spatial

¹ Todorov 1999: 254.

² Keesing 1994: 301.

contexts. As this is not new to anthropology, especially since the publication of the quintessential work of Said (1978) on the construction of the oriental Other as part of the colonial projects of European powers in Asia, this book goes beyond theory to search for a more practical, situated, and applied approach to the study of colonialism and alterity that draws on the theory and methodology of social and cultural anthropology to confront some of the problems and challenges faced by Latin American societies.

Many group conflicts appearing in these societies are closely associated with mechanisms of exclusion constructed through alterity accompanied by stereotypes, discrimination, intolerance, racism, xenophobia and others. We believe alterity and identity form an inseparable pair bound by a self-enclosed dialectic. In this chapter, we first offer some general comments on alterity in anthropology and Latin America and then briefly introduce individual essays which compose the bulk of this book, attempting to deconstruct and transcend the aforementioned dialectic.

Anthropology, Latin America and Alterity

Otherness is certainly not a new topic in the humanities and the social sciences. Several provocative texts have appeared which offer very important insights into the role of the Other in the construction, reproduction, and contestation of group identities at the broadest philosophical, theoretical and methodological level (see e.g. Fabian 1983; Levinas 2000; Baumann and Gingrich 2006). These texts provide a very good framework for thinking about the problem of the Other and offer themselves to practical applications in time- and/or place-specific research. And that is what we do in this book: the place is Latin America and the time is the last five hundred years.

The Others that we explore include indigenous peoples, mestizos, African slaves, women, insurgent peasants, as well as hybrid groups (re-)claiming a new identity. We particularly focus on the visual representation and performance of alterity but give room also to some non-visual ways in which Otherness is established and subverted. Inevitably, it is a diverse selection which nevertheless shares some common problems, concerns and hopes which in their totality provide a complex picture of Otherness in everyday life in historical and contemporary Latin America.

While the importance of alterity in anthropological research on Latin America is certainly not unique and we may observe similar interests in other geographical areas, it cannot be denied that otherness has played a fundamental role in the dual process of the “discovery” and “conquest” of

the continent after it dramatically burst onto the world scene in 1492. As Tzvetan Todorov (1999[1982]) so famously observed, the conquest of America was, above all, a “question of the other”, an epistemological problem that preceded and structured Latin American and world history:

“the discovery of America, or of the Americans, is certainly the most astonishing encounter of our history. We do not have the same sense of radical difference in the discovery of other continents and of other peoples. ... But the discovery of America is essential for us today not only because it is an extreme, and exemplary, encounter. ... it is in fact the conquest of America that heralds and establishes our present identity” (ibid.: 4-5).

Important as it has been, some authors criticized Todorov's work for overemphasizing difference at the expense of shared understandings. For example, Restall (2004) argued that the conquerors and the conquered, after a brief period of initial confusion, actually understood each other very well and collaborated quite intensely in the establishment and maintenance of the colonial order. Restall illustrated his argument with many examples of close cooperation between the indigenous nobility and Spanish officials, a cooperation that began in the first days of conquest and continued for centuries.

This discussion notwithstanding, Restall, however, certainly does not relativize the sense of difference that all the parties to the encounter felt. And Todorov was, by no means, the first to point out the importance of the discursive formation of Latin America. For example, already in 1958, Edmundo O'Gorman (1961[1958]) showed that America had to be invented before it could be discovered. And we can go even further back in time. Was it not the famous *Great Debate* in Valladolid in 1550-1551 personified by Bartolomé de las Casas and Juan Ginés de Sepúlveda that stripped bare the real issues behind discussions about slavery in the New World – the Otherness of Indians?

While it is often argued that the beginning of the colonization of America generated some of the characteristic problems in/of anthropology (ethnocentrism, alterity, ethnicity, racism, etc.), it is also true that the debate in Valladolid laid bare the issues of human rights and cultural recognition. Which is more, Bartolomé de las Casas set the foundations for a new doctrine that has developed into what is now known as *indigenism*, i.e. the defense of Indians by non-Indians, as opposed to the so-called *indianism*, i.e. the self-defense of indigenous peoples. Indigenism was so successful that it led to the adoption of a distinct form of government for indigenous areas which we might call *indirect rule* since the so-called

pueblos de indios or *repúblicas de indios* were governed by indigenous representatives.

While Otherness deeply affected politics towards the Americas, it was also important internally. In his famous *Letter from Jamaica*, Simón Bolívar reveals a painful awareness of the question of the Other in thinking about the legitimization of the independence movement and the future political organization of the continent. The letter, filled with anti-colonial sentiment, was addressed by Bolívar living then in exile in Kingston, Jamaica, to the Englishman Henry Cullen in 1815 who lived in the northern coast of the island. It is a historical document of enormous importance in spite of being essentially a private letter. In this letter, Bolívar, seduced by the ideals of liberty and adopting a Eurocentric perspective, attempts to influence a citizen of the country that most represented liberalism in his times. The great admiration expressed by Bolívar for Bartolomé de las Casas that surfaces in the letter originates in the fact that the Other discovered and defended by the latter served as an inspiration for the former in claiming the right of Latin Americans as *mestizos* for independence and difference:

“we are neither Indians nor Europeans, but an intermediate species between the legitimate owners of the country and the Spanish usurpers; to sum up, being all Americans by birth and endowed with rights from Europe, we have to defend them against the natives and hold our position in the country against the intrusions of the invaders” (Bolívar, Letter from Jamaica, December 6, 1815).³

Almost eighty years later, the same doubts surfaced in the writings of José Martí, the eminent thinker of Cuban independence who reflected upon similar issues as Bolívar while in exile in the USA, but with the advantage of having seen the fate of Latin American republics after Bolívar's passing:

“With our feet in the rosary, a white head and a body painted as Indians and creols, we bravely entered the world of nations” (Martí 1891).⁴

³ In the original: “no somos indios, ni europeos, sino una especie media entre los legítimos propietarios del país, y los usurpadores españoles; en suma, siendo nosotros americanos por nacimientos, y nuestros derechos los de Europa, tenemos que disputar estos a los del país, y que mantenemos en él contra la invasión de los invasores”

⁴ In the original: “Con los pies en el rosario, la cabeza blanca y el cuerpo pinto de indio y criollo, venimos, denodados, al mundo de las naciones.”

The question of the Other thus stood at the heart of social identities forming in the Americas and it did so even long after Spain and Portugal lost their colonies on the continent. The search for the Self and the Other(s) continued on into the twentieth century with the rise of the new nationalism glorifying the *mestizaje*. A good example of this reenvisioning of the Self and the Other is the programmatic statement of José Vasconcelos who in his essay *The Cosmic Race (La Raza Cósmica)* once again posits the question of the Other in search of the new Mexican/Latin American Self:

“Only the Iberian part of the continent possesses the spiritual factors, race and territory which are necessary for the grand enterprise leading to the initiation of the universal era of humanity. All the races with their respective contributions are present there; the nordic man who is now a master of action but who had humble beginnings and appeared inferior at a time when various great cultures had arisen and fallen; the blacks as a reservoir of potentialities which he preserves from the distant times of Lemuria; the Indian who witnessed the fall of the Atlantis but who keeps a quiet mystery in his mind; we have all the peoples and all the predispositions, and we only have to wait till true love organizes and puts into practice the law of history” (Vasconcelos 1948[1925]).⁵

Although we could cite further examples of the process of othering in Latin America, it should be clear by now that this process was both central and difficult. *Central* in that it stood behind all the formative events of Latin American history, and *difficult* in that the Self and the Other were never established easily or permanently, the Other remaining highly elusive and impossible to contain in simple referential frames.

By elusiveness, however, we do not mean irrelevance or unimportance. Quite to the contrary, actually, we believe that alterity lies at the heart of the human condition and the human experience of the world and ourselves. Religions and philosophical systems all throughout history and all over the world have systematically tackled and even combatted the omnipresence

⁵ In the original: “Solamente la parte ibérica del continente dispone de los factores espirituales raza y el territorio que son necesarios para la gran empresa de iniciar la era universal de la Humanidad. Están allí todas las razas que han de ir dando su aporte; el hombre nórdico, que hoy es maestro de acción, pero que tuvo comienzos humildes y parecía inferior, en una época en que ya habían aparecido y decaído varias grandes culturas; el negro como una reserva de potencialidades que arranca de los días remotos de la Lemuria; el indio que vió perecer la Atlántida, pero guarda un quieto misterio en la conciencia; tenemos todos los pueblos y todas las aptitudes, y sólo hace falta que el amor verdadero organice y ponga en marcha la ley de la historia.”

of alterity. But as soon as one form of Otherness is successfully discredited, another one appears to take its place, as strong as ever. In this sense, alterity is like a hydra – the more heads we cut off, the more we will have to cut off in the future.

The question of the Other, therefore, is not something peculiar to America or anthropology, although it was precisely anthropology that contributed to the reification of Otherness more than any other discipline or philosophical system:

“If radical alterity did not exist, it would be anthropology's project to invent it...Radical alterity — a culturally constructed Other radically different from Us — fills a need in European social thought: what Trouillot calls 'the savage slot'....The invention and evocation of this radical otherness which has been anthropology's project required a conceptual universe, a mode of discourse. Especially as the idea of 'a culture' was developed in the Boasian tradition as a bounded universe of shared ideas and customs and as the idea of 'a society' was developed in functionalist social anthropology as a bounded universe of self-reproducing structures, these concepts provided a framework for our creation and evocation of radical diversity. 'A culture' had a history, but it was the kind of history coral reefs have: the cumulated accretion of minute deposits, essentially unknowable, and irrelevant to the shapes they form” (Keesing 1994: 301).

In this context we could define anthropology, contrary to what is commonly written in introductory anthropology textbooks, as the productive study/practice of Otherness. Alterity is what anthropologists study and (re-)produce through their writing. From a science of man it has become a science of the Other, as a consequence of an erroneous conceptualization of culture in the formative days of the discipline.

In the past few decades, anthropology has had to come to grips with the dissolution of its corner stone. The key theoretical and analytical concept on which the discipline was built – culture – is no longer believed to be a good explanatory tool. It is used scarcely, and with a great caution; indeed, if it should be used at all (Kuper 1999: x). The status of culture was put in doubt early on by Geertz (1973) whose work generated a revolution in anthropology and other social sciences. Later on, the concept of culture was further critiqued by writers such as Gupta and Fergusson (1992), who voiced concerns about the ontological existence of culture and its treatment as a causal factor in analyzing human behavior. Kroeber and Kluckhohn's classic work (1952) on the definitions of culture is now desperately out of date, not because there would be so many new definitions of culture but rather because the ontological status of culture has been completely reconsidered.

It is important to note that Latin America played a crucial role in the formulation of theories of alterity. First Mexico and later the rest of Latin America became authentic laboratories for North American social sciences in general, and anthropology in particular. The Boasian particularism that so much motivated the interest for Native Americans soon created conditions for the rise of a new generation of anthropologists who set out to find alterity in the Mexican and Latin American peasantry, drawing on the influential dichotomy between *Gemeinschaft* and *Gesellschaft* developed by Tönnies (1887). In this vein, Redfield (1930), to mention at least one notable example, proposed the concept of the *little community* (harmonious, homogeneous and utopian) and the *little tradition* in his study of Tepotzlán, a small village in Morelos, Mexico, that later would be studied again but from a very different perspective by Oscar Lewis (1960).

As a consequence of all these critical writings, culture is now seen more as an ideology, a discourse, shared system of meaning, or a site of contestation and negotiation of identities (Kuper 1999: x) rather than as an object with causal properties. Culture was dematerialized and deconstructed as a political project (Boggs 2004), opening thus new venues for research on ethnicity, nationalism, and race, which are fundamentally dependent on Otherness.

It is interesting to note that people all around the world construct identities through different rationalizations based on presumed cultural difference. For example, class, religious, ethnic, and national identities are all based on culture. But even those identities which are nominally based on biology such as sex and race derive their force from cultural meanings and ascriptions that are, as some texts in this book demonstrate, often only very loosely associated with phenotypical expressions. In short, cultural or culturally-defined identities allow the inclusion of some and the exclusion of others and reflect both historical processes as well as contemporary social relations (Comarof and Comarof 2009).

Peter Wade (1997), one of the most distinguished specialists in research on ethnicity and racism in Latin America, sees the difference between ethnicity and racism as a mere social consensus rather than as a fact in the world. He argues that behind ethnicity we find a sort of geographical determinism as groups construct their perceived or claimed difference on the basis of territorial occupation. Folk cultural geography thus becomes, intersubjectively, one of the fundamental determining factors of ethnic difference.

Now, after this reconfiguration of the idea of culture in anthropology, how exactly are we to go about our research of people who operate with the concept of culture, use it strategically in political negotiations, and

ground in it their understandings of the Self and the Other? Our partial response to this question is that in studying ethnogenesis and ethnic relations we need to pay more attention to the social construction, performance, and contestation of Otherness as a mirror window of deeper processes and relations.

But how do we do that? How do we go about studying it? Although the essays in this book do offer some suggestions, we are afraid that the deeper paradox of Otherness is yet to be successfully challenged. In our view, the tricky part stems from the fact that the Other is not to be found where it is seemingly located and it is projected to where it is not. Although the Other is always purported to be found “there”, the truth is we need to look for it here. The Other always reveals more about the Self than it does about the person to which Otherness is attributed. The Other is a constitutive part of the Self, it is its cornerstone. By studying Others we inevitably study ourselves. In this perspective, to come back to the geographical area that we are interested in, the conquest of America has been, above all, the conquest of Europe. As it appears, we continue to remain its primary victims, ensnared by the spell of culture conceived as a property of a group:

“we continue to overstate Difference, in search for the exotic and for the radical Otherness Western philosophy, and Western cravings for alternatives, demand” (Keesing 1994: 301).

An alternative then could and should be a highly self-reflective anthropology leading towards a radical problematization of alterity and recovering the little that has survived from earlier humanism. Todorov (1999[1982]: 247) argues that “*the other remains to be discovered.*” We argue, *contra* Todorov, that it is not the Other but the humanity of the Other that remains to be discovered. If we do not realize that, we will face the extinction not of the Kayapó, the Lacandon or the Mapuche, but of humans.

The Essays

The essays in this book offer analyses of the construction of alterity in Latin America. While each of the eight authors focuses on social phenomena from different time periods and parts of Latin America, they all share as their common denominator the Spanish colonization of the continent which set off a series of events whose consequences eventually exceeded the wildest fantasies of the boldest thinkers of all times. Since alterity is partly a phenomenon in which the past meets the present, all the

essays, albeit in varying degree, refer to the past. On the other hand, identities are necessarily contemporary, with a strong presence in politics, economy, religion, and the social life in general, conferring social positions on individuals. Given the great complexity of research on identity, we inevitably face serious theoretical and methodological difficulties. All the authors that have contributed to this book are, however, convinced that it is precisely the anthropological perspective – in spite of the built-in disciplinary deformations – that can provide the most powerful insights into the topic of Otherness.

Eloy Gómez-Pellón offers a perspective on alterity in Peru, grounded in fieldwork carried out in different parts of the country. His essay *On Alterity in Peru: Indigenous and Mestizo Populations* analyzes the social hierarchy which has formed in Peru independently of geographical differences and historical, political and economic reasons. This hierarchy is based, fundamentally, on two independent but complementary criteria. The first is the concept of *social race* based on the phenotype on which diverse cultural considerations are superimposed. The second is ethnicity as the result of the complex ethnogenesis characterizing the Peruvian society and strongly shaping its present form. The author argues that as a result of the existence of these dual and rather flexible criteria of classification, Peruvians are rather hesitant to admit that racial discrimination exists in Peru. This analysis is based on a theoretical framework developed by researchers such as Anderson, Dumont, Gellner, Comaroff, Quijano and others, in addition to Barth. The author concludes that social stratification is generally not based on phenotype, although occasionally the phenotype may play a role in other forms of discrimination. The historically on-going mixing (*mestizaje*) has blurred all possible lines of distinction between indigenous people, whites or “Spanish,” and people of African descent, allowing for the rise of a genuinely unique society in the heart of which we find the spirit of *peruvianness* (*peruanidad*).

Carlos Montes also studies Peruvian society but unlike Gómez-Pellón who offers a general view of Peru, Montes focuses on one particular event in which *mestizo* identity is performed and reproduced. His chapter *Representations of Otherness in Andean Culture: An Interpretative Approach* offers a fascinating analysis of the annual festival in Pisac in highland Peru in which locals, honoring the Virgin of Carmen, bring to life a spectacular show of Otherness, using elaborate masks with rich symbolism creating a complex field of communication of identity. Using a theoretical framework based on the works of Todorov, Geertz, Baumann and others the author uncovers the hidden meanings and “grammars” of alterity present in the event. According to Montes, three distinct structural levels –

the spatial, historical-temporal, and mythical – organize the festival and bestow special meanings on the individual masked characters who through their performance temporarily create alternative geographical and historical realities and serve as models for the establishment of group boundaries. Montes analyzes the play of the sacred and the profane in the symbolism of masks, dresses, behaviors, and accompanying music in relation to the individual characters, the Virgin and spectators. Nevertheless, Montes also comments on the larger political context of the event in which local authorities manoeuvre to maintain their grip on power.

Elizabeth Manjarrés examines in her chapter *Body, Sexuality and Proxemics in the New Kingdom of Granada and the Province of Venezuela as Portrayed by the Chronicles of Fray Pedro de Aguado (1550-1582)* the use and function of proxemics in this part of South America during the colonial period in mid-sixteenth century. Through the accounts written by colonial chroniclers such as Gonzalo Fernández de Oviedo, Fray Pedro de Aguado and others, and using Hall's hidden-dimension perspective, Manjarrés explores the significance of personal and social distance in the representation of the Other. She analyzes the culture clashes experienced by European colonists and Venezuelan natives in their first encounters marked by curiosity, ethnocentrism, and misunderstandings. The author shows how the encounter between distinct and distant worlds involved a multiplicity of views of the Other, at times curious and exotic, at other times vain and arrogant. The public distance of most encounters indicated fear and interest amongst all involved. The Marianic iconography condemned physical contact between strangers to prevent sin. Yet some encounters were more intimate, involving touch, smell and taste, and violated mutual expectations of personal space and proper manners. Where Montes focuses on an exceptional, albeit repeating event, Manjarrés points out the importance of ordinary unconscious bodily conduct and everyday performance and embodiment of alterity.

José-Luis Anta submits to a feminist critique the chronicle of Felipe Guamán Poma de Ayala, the well-known chronicler of late sixteenth and early seventeenth century Peru. Felipe Guamán was one of the first Spanish chroniclers with indigenous roots that tried to bridge the two worlds – the Indian and the Spanish. As an Indian by birth, he saw the Other in the Spaniards, yet as someone with Spanish education, upbringing, and career aspirations he also saw the Other in the Indians. Anta's chapter *The Other View: Women in the Chronicle of Guamán Poma de Ayala* provides a well-rounded analysis of this duality of Otherness with a rich layer of meanings which are often ambiguous and sometimes even contradictory. Anta pays a special attention to the representation of women

in Guamán's chronicle, basing his comments on textual but also pictorial materials from the chronicle. He shows how Guamán drew on Indian as well as Spanish ideas about women to portray them as both the cornerstone as well as the obstacle of the *buen gobierno* which in Guamán's view should be based on the revival of certain Indian institutional forms by the Spanish colonial administration. As Anta persuasively argues, the woman as the Other has played a central role in the constitution of Latin American societies and much like the Roma in the following chapter women have also been an invisible Other, omnipresent yet curiously absent as an historical subject endowed with agency.

Fernanda Baroco and David Lagunas offer an interesting perspective on the Roma/Gypsies in Mexico. In their chapter *Another Otherness: The Case of the Roma in Mexico*, the authors attempt to explain the causes for the invisibility of the Roma as a distinct cultural minority. They argue that we should give greater attention to the Roma in anthropology and other social sciences to fill in the void that has resulted from a lack of interest in this minority on the part of colonial and Mexican authorities, chroniclers, politicians and scientists. Basing their analysis on the works of Bordigoni, Fraser, Piasere, and others, the authors show that the Roma Other is an invisible Other, one that has adapted individually and collectively to historical persecutions and discrimination and has learned to pass unnoticed to improve his/her position in the society. Only recently have some Roma groups begun to fight for recognition, combatting the sometimes degrading, at other times romantic stereotypes to which they have been subjected for centuries. As the authors show, there has been no room for the Roma in the project of the Mexican nation and there is still a long struggle ahead of them, not only viv-à-vis the Mexican state and the general public but also viv-à-vis Mexican anthropology.

Joël Graf analyzes Otherness not as a condition but as a strategy, and one that is used not by the dominant powers but by subaltern voices in their quest for justice and legitimacy. Graf's chapter *Constructing the Other while Being the Other: The Zapatista Movement During the Mexican Revolution* is set in a crucial period of Mexican history when Emiliano Zapata, a peasant leader from the state of Morelos, organized a popular army that made a significant contribution to the Mexican revolution. The Zapatistas first fought against Porfirio Díaz and later against the caudillos of the revolution – Francisco Madero, Victoriano Huerta and Venustiano Carranza. Regardless of their temporary victories and losses, all throughout the struggle the Zapatistas faced a constant problem with legitimacy. Zapata tried to resolve this problem by publishing numerous manifests in which he used Otherness of the enemy as a strategic tool for

raising support for his army. Even though the enemy changed during the years, as Graf shows, the rhetoric of Otherness remained quite similar and always central to the manifests. As a historian, Graf bases his analysis on authors such as Brunk and Womack, offering a simple yet very persuasive and innovative reading of well-known historical sources, thus proving the value of a perspective that foregrounds the Other.

Přemysl Mácha explores the transformation of one particular Other in the history of the American Southwest that once used to be part of Latin America. His chapter *The Comanches of New Mexico: Dancing with the Other in the Latin American Borderlands* focuses on the role of the Comanche in the process of ethnogenesis in New Mexico from colonial times to the present. The fate of the Comanche Other, distant and near, enemy and friend, but also neither-nor, in-between, condenses the essence of the difficult coexistence of the Hispanic, Anglo-American and Puebloan populations. A particular attention is paid to the performance of Otherness in folklore, dance, and drama that visualize and revive the Other in annual celebration of group identity. Drawing on theories of ethnicity developed by Barth and Eriksen and theories of hybridity associated with the writings of Bhabha and others, Mácha attempts to find a common ground for the analysis of Otherness as a formative element in ethnic relations and the politics of identity.

Markéta Křížová attempts to identify the key factors that stood behind the constitution of the image of the African slaves in the Spanish American imagery. Her chapter *Not Exactly the Other? Africans in Late Colonial and Early Independence Identity Discourse in Spanish America* argues that Africans and their descendants played a paradoxical role in ethnic and racial relations in Spanish America that contrasts rather sharply with the contemporary image of the Indians but also with the position of Africans in British America. On the one hand, Africans were enslaved and *de facto* deprived of their humanity. Yet, in the identity discourse they were not considered a radical Other unlike the Indians who, however, enjoyed legal protection. On the other hand, compared with Africans in British America who were considered less-than-human, Spanish American Africans were commonly subsumed in the body of civilized peoples who stood in opposition to uncivilized barbarians, the Indians. Křížová traces the evolution of the African Other from the Middle Ages to the early independence period and the abolition of slavery, pointing out the crucial moments which determined the fate of Africans and their descendants and kept them discriminated in spite of the victory of liberalism and the associated ideas of equality and freedom.

On first reading, this may seem like a motley-crew of topics, places, and times. And, indeed, the multiplicity of Otherness is truly overwhelming in its historical omnipresence, diversity, and force. Underlying this multiplicity of exclusion, however, is a common attempt by a certain portion of the population to exercise material and symbolic control over the rest of the society, be they women, indigenous peoples, African slaves, or the Roma. An analysis of Otherness therefore inevitably brings us to an analysis of power asymmetries. Such analysis requires us to take a moral stance and obliges us to become engaged on behalf of the oppressed and marginalized. In this sense, the anthropology of the Other turns into the anthropology of emancipation. We strongly believe that this is how anthropology should be practiced – instead of producing the Other it needs to problematize it and replace it with an analysis of humanity, always sensitive to the multiplicity of humanities present in the world.

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CHAPTER ONE

ON ALTERITY IN PERU:
INDIGENOUS AND MESTIZO POPULATIONS

ELOY GÓMEZ-PELLÓN

Introduction

In Peru, two basic theses exist about the inequality between its population groups. In brief, the first thesis, which originated in colonial times, survived the republican period and reached the present time transformed, maintains the racial inferiority of the American natives, compared with the foreign colonisers. Modern sensibility in the intellectual thought of academic and political elites has overcome, increasingly clearly, but never completely, the thesis of the racial inferiority of the natives which flourished in universities and intellectual circles until well into the twentieth century.

During the first quarter of the twentieth century, this thesis was subtly and slowly replaced by another that substituted biological inferiority with cultural inferiority, without ever putting an end to the ardent defence of the old version, in its popular variant. The thesis, which radically denied the autonomy of the Indian Other to progress socially, states that if there was anything the indigenous population could do, it was to benefit from mestizo protection, which justified the role of the mestizo as a tutor or protector of the native. In this way, in time, the native could become mestizo by emulation, while the mestizos were called to be the soul of Peruvian nationality, the essence of a great *peruvianness*. Within this paternalism, in the course of the twentieth century, the State developed indigenous legislation that was protective and condescending with the natives, but without ever asking for the Indian's opinion in its design.

Contrasting with this thesis, as explained clearly by Fernando Fuenzalida (1970: 22-23), since the early twentieth century, another has been widely accepted, together with the first, and this is the key to understanding that

the so-called question of the indigenous Otherness lies at the base of the permanent difficulties for Peru to progress. This is the thesis of cultural dualism, which, although it was already well-known, was reformulated by José Carlos Mariátegui (1928) and since then has been accepted by most of the political and academic elites. It maintains that the problem, or *indigenous question*, as it is known in Peru, lies in the existence of two profoundly disarticulated population segments. One is traditional, static and pre-industrial, whereas the other is modern, dynamic and industrial. To express the same idea in other words, it is the contrast between the indigenous mountains and Amazonia, compared with the Spanish and mestizo Coast.

It may be thought that the first thesis, after its later re-adaptation, and the second one have a fundamental point in common, which is that the indigenous population is a hindrance to progress in Peru, and also to the formation of a national identity. Despite this, rhetorically, in the thesis of cultural dualism, it is claimed that the personality of indigenous culture is the very soul of the spirit of *peruvianness*, which is still to be constructed. Indeed, native culture is assigned the honourable role of being the source, albeit only that, of modern *peruvianness*.

Theoretical Discussion

To demonstrate the reality of modern racism in Latin America, specialists have often located its origins in the colonial period, when the Spanish metropolis created a classificatory ideology based on discrimination, which supposedly classed people according to their phenotype characteristics, allotting them in consequence greater or lesser access to power and resources. This point of view appears to have its foundations, according to Todorov (2009: 36-37), in the ethnocentrism that the Spanish displayed from the very start of their conquest of America, convinced of their clear technical and symbolic superiority over an indigenous population that was perceived to be of a homogeneous and different color, with identical nakedness and a homogeneous lack of cultural attributes. As explained by Quijano (2000: 202-204), the idea of race appears to be tied to the birth of America as a historical entity, and what may have initially been used as a way to classify phenotype differences between conquistadors and the conquered, in time became a barrier separating the biological structures of each one, perhaps as a way of granting legitimacy to the relationship of domination imposed by the conquest. This is what would have happened when the Spanish administration created, at least, the distinction between the so-called Spanish *lineages*, Indians and *browns* or Negro individuals.

A series of categories or *castes* derived from the corresponding mixtures, including that of *mestizos* (resulting from the union of Spanish men and Indian women) gradually acquired great demographic and cultural weight.

In practice, from the very beginning, the inclusion of individuals in the castes was a response to numerous social and cultural variables, among which the desire of many parents to integrate their children in the group of their progenitors played a determining role. Nonetheless, Quijano (2000: 202-204) claims that what is now known as racism had its origins in the British-American area, where the separation of the Negroes was more important, both because they had become an instrument of economic exploitation and out of an interest in reducing them to the condition of “colonised race”, and this led to the slow introduction of the same conception in Spanish-American countries. At the same time, it is thought that after the birth of the republics, in the nineteenth century, the racial process would have been encouraged perhaps as a consequence of the need for the *criollo* (Americans with European ancestry) minority to legitimise their seizure of resources, institutions and power, under the appearance of generating the corresponding ethnic identities, so closely tied to equations of power, as noted by Comaroff (1996) and Comaroff and Comaroff (2011). What began as discrimination ended as racism. In this sense, it is thought that until the nineteenth century, no phenomenon comparable with racism, in the strict sense of the word, existed for several reasons.

It is therefore believed that the hierarchic society at that time possessed more than sufficient mechanisms of discrimination, based on solid social stratification, which reduced social mobility to the minimum, without needing to resort to the ideology of racism. In the colonial period, the lineages and the castes would have fed a structured state society. It is equally thought that as the modern State was shaped it required the existence of a powerful closely-knit group, as homogeneous as possible, to stop peripheral groups troubling the core, in order to create *imagined communities* (Anderson 1993), which was made possible through ideologies that ensured the supremacy of the former, the dominant group, and the distancing from power of its competitors (Gellner 1988). However, when class society crystallised, after the birth of the Latin American republics, it was accompanied by great mobility of individuals, and therefore by inconsistencies in the status of people. As a result, complementary mechanisms of social stratification had to be sought, and one of these was the radicalisation of the instrument of racial classification.

Furthermore, it is even thought that discrimination that attributes a fundamental value to race is particularly compatible with societies that grant most importance to equality as a political principle, as shown by Dumont (1977), a great scholar of ideologies, in his *Homo aequalis*. Although modern, liberal and egalitarian individualism is presented as the antithesis of such a profoundly and rigidly hierarchic system as the Indian caste system, it is basically founded on analogous logical principles. In the absence of other ranking criteria that might contradict the established order, liberalism, which necessarily ranks people, opts for the search for patterns such as natural ones, which also harbour inequality and, at the same time, are supposedly uncontroversial; the ideology of racism, based on “natural” principles is a good example. The principle that people are equal in law is fully compatible with individual differences. In this respect, it is credible that the French Revolution marked a turning point in the life of the modern State, as it broke with criteria that had been used until then to trace out social taxonomies.

Dumont's observation is related to the interpretation of racism made by Wieviorka (2003), according to which modern ideology was constructed on the principle of equality as a political value, overcoming the previous situation which believed in inequality as a value. This does not mean that until the advent of modern society these criteria were not used, but that they lacked consistency due to the absence of rationalisation. After the French Revolution, these “natural” criteria grew in strength and appeared with greater or lesser intensity depending on historical circumstances. It is increasingly agreed that racism, in its modern form, is the subterfuge of modernity that made compatible the acceptance of the universal principle that all people are equal with a difference that is disguised as science and reason.

The fact that race as a concept has been discarded in scientific fields is not an obstacle for racism to exist, often disguised in many ways. At an intellectual level, it is often dealt with in the concept of *social race* (Wagley 1971), which is based on phenotype on which very different considerations of a cultural kind are overlaid. The concept is partially emptied of its biological contents to be replaced with a cultural content that is used as an element of social ranking. The “social race” would be the result of a procedure adopted by numerous societies to form groups of people, according to real or imaginary biological or cultural criteria. Neither is it unusual for concepts like ethnicity, which refers to differences between human groups due to cultural causes, to be linked with the idea of race, which means that the former absorbs the significance of the latter. As they are complex concepts, which generate strong feelings, they are often

associated with analogous concepts which, however, possess different meanings depending on the context. Human beings, without us realising it, classify by using cognitive mechanisms that are common, like hetero-ascription and self-ascription. This is how we shape our in-groups and our out-groups, which are the key to our identity configurations.

Within social sciences, opinions expressed by the scholars who have studied Peruvian society are very varied and encompass at least four different attitudes. With the assistance of Néstor Valdivia (2010), the names of some well-known authors will be assigned to the corresponding attitudes. In the first place we find those who maintain, in consonance with what has been explained above, that the classificatory ideas based on the criterion of “race” are very frequent, but their content is much more cultural than biological, and therefore instead of racism it is more correct to speak of ethnicity (De la Cadena 2004, 2007). Second, some authors argue that phenotype is often used as a criterion, but as one of several variables, although the appreciable weight of the “racial” variable is accepted (Twanama 1992). Third, others regard racism as a fundamental criterion in the taxonomies made by Peruvians, to such an extent that it is the element articulating Peruvian society, as it is based on two highly important and complementary points: the little appreciation of what indigenous society has produced and continues to produce and the positive value given to white people as the desirable “aesthetic canon” (Portocarrero 1992, Manrique 1999). Finally, there are those who rule out the phenotype as the axis articulating Peruvian national discourse, and doubt its possible discriminatory power (Ortiz 2001). These four positions are susceptible to being complemented by others that might be considered eclectic.

However, these eclectic positions maintain a rational position, which is that the question whether Peruvian society is discriminatory in accordance with the phenotype has so many nuances that it cannot be accepted in any radical way. The answer will depend on the context, e.g. rural or urban, cultured or popular, etc. They also assume that it would be of greater interest to answer a question that instead of dicotomizing would refer to the extent of the practices that might be called “racist” in Peruvian society. Practically all social scientists who have studied Peruvian society agree on this point, which indicates that the classificatory canons functioning in that society are extremely complex, just as in other societies, particularly in native America, including the highlands of Peru and Bolivia, and also in Mexico and Guatemala, as shown by Gall (2004) for Mexico and by Casaús (2000) for Guatemala. Indeed, exclusion owing to such causes as poverty, illiteracy, gender and age may be as important as, or more important than, ethnicity, and it is very likely that, depending on the context, they cannot

even be separated. As a result, it becomes impossible to determine on the basis of statistical information whether the causes of discrimination in Peruvian society are principally ethnic or racial.

The common denominator in all colonial societies, as regards racism, seems to be linked to the conservation of privileges. This suggests that the phenomenon may be more closely related to the ideology of class society than to the form of the Nation State, as proposed by Anderson (1993). As colonisation forces the relationship of dominion by the colonisers, it is plausible to think that in post-colonial phases, the *criollo* bourgeoisie and more favoured power groups would have had to harbour other criteria that, by modifying their appearance, achieved the same objectives, which were to maintain the difference in the access to resources and the control of the institutions. This has been highlighted with extraordinary acumen by the German anthropologist Gareis (2005: 11-13), when she refers to the survival of attitudes in American post-colonial societies that have their cause in the previous period, whose objective was to maintain social distances that had been extremely beneficial for the powerful. In turn, this would explain that the role of the dominated was still played by indigenous groups, which had become a minority, if not quantitatively, in a way that may be called qualitative, and consisted of denying them their legitimate rights. It should not be forgotten that in the Republic of Peru, at the time of its independence, the indigenous people was several times more numerous than the rest of the population.

Some authors, like Van Dijk (2003, 2007) have repeatedly shown that the interwoven racism in Latin America is sustained by the merciless action of the elites and their acceptance of the philosophy that feeds power and authority, of which they form part, owing to the control they exercise over the public discourse. These political, legal, economic and academic elites, through the many important posts they hold, are capable of creating an apparent consensus about the situation of the ethnic minorities. Van Dijk himself emphasises the fact that these intellectual elites generate a situation which, despite being seemingly vindictive and even complacent with protests, holds back any attempt at changing the system, thus making conflict, sometimes more hidden and at other times more open, a constant in time.

Who Is an Indian for the Peruvian Administration?

Peruvian society, in a similar way as other Andean societies, classifies people as it traditionally has, with a typology that basically corresponds to the original existence of three segments: Indians, *criollos* or whites, and

mestizos. Apart from these main categories, there are others, like Negroes, mulattos, Asians, and so on, which represent smaller population groups. The three traditional categories: Indians, mestizos and whites, are the ones that essentially form the Peruvian nation, although not to the same degree, because nearly two centuries after the creation of the Republic of Peru, the debate on the national identity or peruvianness still continues. These are the categories that, after crystallising in the colonial period, have remained in the Peruvian consciousness until the present time, albeit in very different ways at different times, due to the variations that power has successively introduced in the anxious search for the *imagined community*, as Anderson (1993) would say. In this respect, although the mestizo group is vital to form a gradation that gives greater verisimilitude to the classification, new intermediate categories tend to be placed between one extreme and the other. Despite being known, these may appear and disappear depending on the rhetoric of the elites and, naturally, on the political orientations.

In 1940, the census showed that the indigenous population represented 45.8% of the total population of the country (information in the Fifth Census of the Population of Peru). The immediate precedent was the fourth Census in 1876, when the indigenous population amounted to 54.9% of the total (*vid. Gootenberg 1995: 38*). As in the later census, this provided full information about the distribution of the races in the population. However the data was dubious, as it was obtained through a methodology that allowed the interviewer to assign racial category to people in those cases in which they disagreed with the interviewee's declaration; to do this they used the so-called "objective estimation", which is to say their own perception as interviewer, following the guidelines in the census handbook. We know that in 87% of the cases it was the interviewers dissatisfied with the interviewee's answer who assigned the "race" (Valdivia, 2011: 88). The "objective" observation of the interviewer was basically aimed at defining the individual's phenotype. The technique consisted of classifying the population into one of the main racial groups (whites, Indians, Negroes and yellow). Everyone who did not belong to one of these four was assimilated with the mestizo group. The latter, together with the whites, went from 38.6% to 52.9% of the population between 1876 and 1940, and thus constituted the non-Indian group, excepting the tiny minorities of the Negro and yellow group. The conclusion of the census, just as the government wanted to demonstrate, was that Peru had overcome its old Indian nature to become mestizo, which was simultaneously the source of the national formation of the Peruvian identity.

If race had been used as a category in the censuses up to 1940, after that time it fell into disuse. However, the old criteria for classification were transformed and ethnic aspects acquired greater weight, so that they continued to inform the Administration about racial categories indirectly. Since then, as can be seen in the Sixth Population Census in 1961, language has been used as the basic classification criterion, and complementary with that, such criteria as the use of traditional clothes (for example the poncho), and traditional footwear (for example, *ojotas* or sandals), or the customs of chewing coca or walking barefoot. At the same time, in accordance with Convention 107 of the International Labour Organisation (ILO) in 1957, which was binding at the international level although it was soon to be revised, a maximum priority was given to indicators of literacy, school attendance, etc., based on the debatable and restrained presumption that indigenous societies were *temporary*, in other words that they would inevitably disappear in the short or middle term due to the effects of modernisation.

Therefore, since 1961, allusions to Indians have been removed from official statistics, and they have basically become citizens deprived of many of their individual rights. However, Convention 107, which was signed by a small number of countries, without ever losing effect, was complemented by ILO Convention 169, signed in 1989, which was to have major repercussions for the so-called *original people*. This Convention came with a very different idea: indigenous people form permanent societies, which forces the States where they live to acknowledge and respect their ethnic and cultural diversity, and under this mandate lies an ideal of equality that would have an impact in countries like Peru. The Other, either individual or collective, could not continue being reviled; quite the contrary, they should be valued and recognised on a level of equality.

In consequence, and to return to the comment made above, the constant changes in the measurement methodology only means that huge disparities can be seen in the censuses as a clear proof of the inconsistencies in the criteria used. Whereas in the 1972 Census, the indigenous population of Peru was determined to be 30.5% of the total, according to the comparative analysis carried out by Peyser and Chackiel (1999: 7), in the 1981 Census the percentage was 24.8% and in 1993 it was 40.2%. Note the decline in the 1981 Census compared with the previous one, in a period of only nine years, and the rise in the following census, again after only a decade.

Thus, in the last decade of the twentieth century, changes were introduced in the Constitutions and legal texts in Peru and other countries in the region, whose most notable aspects were the clear defence of legal