

# Ideology and Social Improvement in Bolivia during the 20<sup>th</sup> Century

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## Abstract

This essay relates improvements in social indicators in Bolivia during the 20<sup>th</sup> century to ideological changes during the same period. During the 20<sup>th</sup> century, most social indicators improved dramatically in Bolivia. Separately, scholars have vigorously debated ideologies, such as neoliberalism and its macroeconomic competitors as well as the potential social impact of these ideologies. Despite the separate emphases on ideas and social outcomes, no systematic attempt has been made by scholars of Bolivia to link long-term ideological change to long-term social improvement in the country. This essay argues that it is probable that such a relationship exists. However, it is important to consider mass ideology, which affects the whole of Bolivian society. This is in addition to the elite ideology, which affects a much more limited portion of society.

## Keywords

*Catholic Credit Cooperatives, Christianity, Evangelical Protestantism, Literacy, Social Improvement, Neoliberalism, Vatican II Reforms*

## Resumen

Este ensayo relaciona las mejoras en indicadores sociales en Bolivia durante el siglo XX con cambios ideológicos registrados durante el mismo periodo. Durante el siglo XX la mayoría de los indicadores sociales mejoraron

dramáticamente en Bolivia. Los especialistas han debatido vigorosamente la relación de estas mejoras con ideologías tales como el neoliberalismo y sus competidores macroeconómicos, discutiendo su potencial impacto social. Sin embargo, pese al énfasis otorgado a la relación de las ideas con los resultados sociales, no ha habido ninguna tentativa sistemática por parte de los especialistas en sentido de relacionar el cambio ideológico de largo plazo con las mejoras sociales de largo plazo en el país. Este ensayo sostiene que es probable que tal relación exista, pero para visibilizarla es importante tomar en cuenta la ideología de masas, que afecta al conjunto de la sociedad boliviana, además de la ideología de la élite —que afecta a una porción mucho más limitada de la sociedad.

**Palabras claves**

*Alfabetización, Cooperativas Católicas de Crédito, Cristianismo, Mejoras Sociales, Neoliberalismo, Reformas del Vaticano II, Protestantismo Evangélico*

This essay relates improvements in social indicators in Bolivia during the 20<sup>th</sup> century to ideological changes during the same time period. During the 20<sup>th</sup> century, most social indicators improved dramatically in Bolivia. Analysts have begun to emphasize the importance of ideological factors alongside material factors in determining social outcomes. But while scholars have vigorously debated elite ideologies, such as neoliberalism and its macroeconomic competitors, no systematic attempt has been made to link long-term ideological change to long-term social improvement in the country. This essay argues that it is probable that a relationship between ideas and social improvement exists. However, it is important to consider mass ideology which affects the whole of Bolivian society, in addition to the elite ideology which affects a much more limited number of people. Religion is the most important indicator of mass ideology and there has been significant religious change in Bolivia during the time period in question. This religious change is better correlated with the prevalent social improvements than with any change in elite ideology. Religious change affects social outcomes through at least three mechanisms: increasing literacy, facilitating large-scale social organization and supporting beneficial social institutions such as credit unions.

This essay synthesizes findings from anthropology, sociology, history and comparative politics and incorporates data from the review of archival documents in Bolivia and the U.S. It is based on direct observation in Bolivia over fourteen years and incorporates data from sixty-three interviews conducted from August 2007 to October 2009 in country.

## The Hockey Stick of Social Improvement

Bolivia remains poor at the start of the 21<sup>st</sup> century. Infant mortality in the country was about six times that of the U.S. in 2008 and life expectancy at birth was sixty–six years, twelve years less than in the U.S. during the same year.<sup>1</sup> This poverty has led to pessimism about Bolivian social indicators (Gill, CEDLA 56). As a Peace Corps Volunteer working with *campesinos* in northern Potosí from 1997 to 2000, I witnessed these needs firsthand.

But on the whole, social indicators have improved dramatically in the second half of the 20<sup>th</sup> century in Bolivia. Herbert Klein has examined these trends in a seminal article entitled “Social Change in Bolivia since 1952.” For instance, literacy was approximately 18% in Bolivia in 1900 and 31% in 1950 but had reached 87% by 2001.<sup>2</sup> Infant mortality decreased from about 155/1,000 live births in 1960 to about 42/1,000 live births in 2008, and life expectancy at birth increased from about forty–three years in 1960 to the previously mentioned sixty–six years in 2008.<sup>3</sup> Political scientists have estimated that the standard of living in major cities in developing countries is approximately three to four times what it is in rural areas, and by 2001 approximately 62% of Bolivians lived in or near urban areas, up from about 26% in 1950.<sup>4</sup> The magnitude of these changes constitutes nothing less than a demographic revolution.

This dynamic social improvement is represented concisely in the following two sets of curves showing increased urbanization and improved literacy during the 20<sup>th</sup> century. The curves represent what I call a Hockey Stick of Social Improvement (figs. 1 and 2).

<sup>1</sup> World Bank, World Development Indicators Online

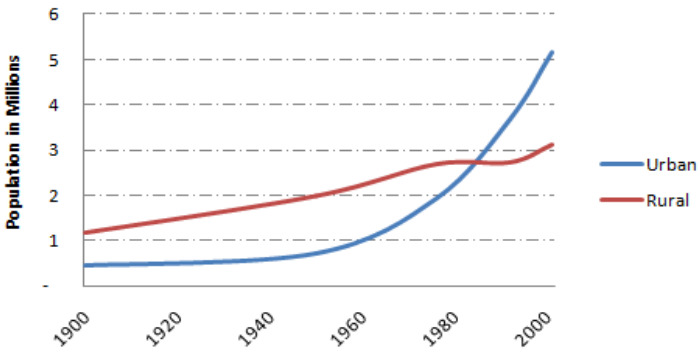
[<http://data.worldbank.org/indicador>] accessed Feb. 2011.

<sup>2</sup> For literacy in 1900, see Censo general (2:44). Eighteen percent is a conservative estimate that omits 211,024 children less than seven years of age “sin instrucción” from the denominator. Calculation: 217,593 “con instrucción” ÷ (1,086,559 “sin instrucción” + 118,434 “no consta”); for literacy of those fifteen and over in 1950, see Censo demográfico 1950 (112). Calculation: (1,569,989 “analfabetos” –460,604 “analfabetos de 5 a 14 años”) ÷ (2,278,502 “Personas enumeradas” –645,189 “de 5 a 14 años”); for literacy for those over fifteen for 1976, 1992 and 2001, see “Cuadro N° 2.1 Bolivia: Tasa de alfabetismo de la población de 15 años de edad por sexo según censo, área y grupo de edad, censos de 1976, 1992 y 2001” (INE 2001a). See methodological note on aggregating literacy data in Table 1.

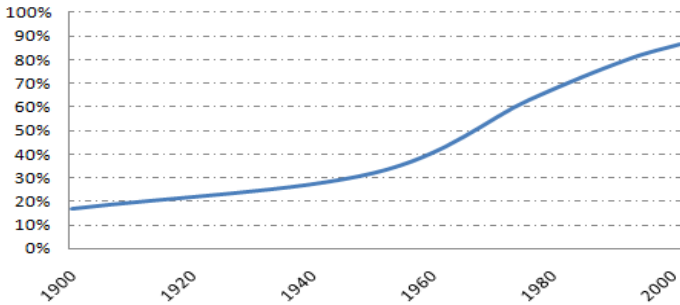
<sup>3</sup> World Bank, World Development Indicators Online, accessed Feb.2011.

<sup>4</sup> “Cuadro N° 1 Bolivia: Población total por área según censos de 1950, 1976, 1992 y 2001” (INE 2001a).

**Rural vs. Urban Population in Bolivia in 20th Cent.**



**Literacy in Bolivia, 1900 - 2001**



**Figures 1 and 2: Bolivian urbanization and literacy**

Source: Urbanization figures for 1950, 1976, 1992 and 2001 are from “Cuadro N° 1” (INE 2001a); Urbanization figures for 1900 are from *Censo General* (1:20). The definition of urban in the 1900 census was 200 or more inhabitants (1:21) while in all censuses starting in 1950 the definition was 2,000. Nonetheless, aggregating urbanization data across the censuses is still useful given the large variation during the 100 years examined.

Year	Urban population	Rural population	% population in urban area
1900	439,005	1,194,605	27%
1950	708,568	1,995,597	26%
1976	1,925,840	2,687,646	42%
1992	3,694,846	2,725,946	58%
2001	5,165,882	3,108,443	62%

See note 2 above for data sources for literacy rates.

But compelling as this evidence might be, the widely-cited development economist Amartya Sen cautions that quantitative analyses can fail to capture a diversity of development experiences. Some people can be left behind (Sen). It is therefore necessary to complement quantitative analysis with qualitative analysis. But here, too, my observation of selected rural-to-urban migrants over fourteen years largely corroborates the optimistic assessment of social development in Bolivia conveyed by quantitative analysis. Consider, for instance, Máximo Cisco, a rural-to-urban migrant who lives on the outskirts of Cochabamba near the tollhouse to Sacaba. I met Máximo in 1997 in the small market town of Toro Toro in northern Potosí. As a young man he had moved to Toro Toro from the nearby Laymi Cotani *ayllu* where his parents were subsistence farming *campesinos* embedded in a cashless barter economy. While Máximo assimilated to *mestizo* norms of dress, language and conduct in Toro Toro —thus becoming a *vecino*— he had grown up in Laymi Cotani speaking only Quechua. I visited his birth village with him in 1998 when he was thirty-seven. The hamlet was a collection of adobe twenty houses about four hours walking distance from Toro Toro. In the absence of a modern water system, people drank from the same watering holes as their livestock. On our walk I was surprised to learn that Máximo had not seen the store-bought crackers we were sharing until he had trekked in to Toro Toro for the first time when he was fourteen years old.

By 2008 Máximo had moved to the outskirts of Cochabamba, a move that represented a marked improvement in his and his family's material well-being. When I visited him in 2008 in the amorphous house in the urban slums between Cochabamba and Sacaba, Máximo had completed his transition to becoming a *cholo*, or urban-based *mestizo*. He spoke primarily Spanish with his children and made his living as a travelling salesman selling eucalyptus ointment that he had manufactured and branded himself. Building on his existing contacts, he was planning to sell Herbalife, a mass-marketed health product. His two-room, single-level brick-walled house had electricity, running water, and a television, though the latrine was still a work in progress. In this 2008 visit, Máximo wryly mentioned to me one project to reinstitute the barter economy in his birth region. He complained, "This is like going the wrong way down a one-way street. Money is better."<sup>5</sup>

<sup>5</sup> "Va contra flecha. Moneda es mejor." Personal interview. Cochabamba, Sept. 26 2008.

The juxtaposition of two images (figs. 3 and 4) represents this process of social improvement. Figure 3 shows Sebastian, a subsistence farmer living in a northern Potosí hamlet similar to Máximo's birth village in 2000. Sebastian is watching as a hail storm destroys a neighboring community's potato crop. The hail storm represents an existential threat for him and his family as well as a reminder of the Malthusian pressures those living in an *ayllu* still face. Figure 4 shows Máximo holding his eucalyptus ointment in the living room of his Cochabamba house in 2008.



**Figure 3: Hailstorm in northern Potosí**  
Source: Brian Norris photographic archive



**Figure 4: Máximo Cisco**  
Source: Brian Norris photographic archive

## Existing Interpretations of Bolivian Ideology: Pendulum or Palimpsest, but not Hockey Stick

The earnestness with which Bolivian scholars of divergent views have debated neoliberal ideology in the late 20<sup>th</sup> century suggests a belief that ideas do matter for social outcomes (García Linera, et al; Gill; Conaghan, et al; Morales). Ideology here means any belief system, whether secular or religious, that can neither be verified nor falsified by empirical evidence. The most famous version of the argument that ideas matter for social change came from the sociologist Max Weber in his 1905 essay, *The Protestant Ethic and the 'Spirit' of Capitalism*. Here, there is no reason to attach particular importance to Protestant beliefs, per se, but rather, it is the general theoretical insight that ideas alongside material factors matter for social outcomes. A more recent constructivist literature that is influential for important Bolivian intellectuals makes essentially this same point (Bhabha, Butler).

If the overall trends in social improvement in Bolivia in the 20<sup>th</sup> century have been positive, as the analysis above suggests, and unidirectional, as Máximo Cisco suggested, then one might assume that ideological evolution too would display a progressive trend. However, the ideological trends that analysts have observed in Bolivia in the 20<sup>th</sup> century followed one of two discernable patterns, neither of which appears to be well correlated with the Hockey Stick of Social Improvement.

The first pattern observed in Bolivia is that of the Ideological Pendulum, an oscillation between statist and anti-statist (or liberal) ideologies since Independence. Bolivia has had four major historical waves of liberalism since the early 19<sup>th</sup> century. The first wave of liberalism immediately followed independence from Spain in the 1820s and was largely the result of external events such as the Napoleonic invasion of the Iberian Peninsula (Lofstrom). The second wave of liberalism in the 1860s and 1870s coincided with a regional heyday of liberalism (Bushnell, 193–246) and was associated with the infamous Melgarejo regime in Bolivia (1864–1871). The third wave followed the Federalist War of 1898–1899 (Langer). The fourth wave of liberalism was represented by the well-documented New Economic Plan in 1985 that came into being both because of the need to respond to disastrous hyperinflation resulting from the nationalization of large parts of the

Bolivian economy after the Revolution of '52 (Sachs and Morales) and because of an evolution in thinking among some of the inheritors of the Bolivian Revolution's ideological mantle.<sup>6</sup>

Each of the four waves of liberalism was punctuated by a period of illiberal policy. Two such shifts occurred during the 20<sup>th</sup> century. The Revolution of '52 ushered in a period of state-led development which effectively lasted until 1985.<sup>7</sup> The most sophisticated statement of the statist economic ideas dominant during the middle part of the 20<sup>th</sup> century is the still influential 1958 United Nations/ECLA report *Análisis y proyecciones del desarrollo económico, IV: desarrollo económico de Bolivia*, written under the supervision of Raúl Prebisch (ECLA). Brief moves away from the state-led development model during this period such as the stabilization of Bolivia's 1957 hyperinflation described by George Jackson Eder in *Inflation and Development in Latin America: A Case History of Inflation and Stabilization in Bolivia*, were exceptions that proved the rule. The Bolivian ideological debates mirrored the larger 20<sup>th</sup> century debates represented by John Maynard Keynes, for the statist orientation, and F.A. Hayek and Milton Friedman, for the free market orientation.



Figure 5a: A La Paz mural depicts *cholo* and indigenous culture  
Source: Brian Norris photographic archive

<sup>6</sup> Personal interviews. Washington, DC, March 9 2009 and March 8 2010. See also Conaghan (258).

<sup>7</sup> This period of state-led development probably started well before the Revolution of '52. For instance, the Bolivian government had had a monopoly on phosphorous matchmaking early in the 20<sup>th</sup> century, and as early as 1912 had dured a shortage of matches. See McQueen (9) and Schurz (183).



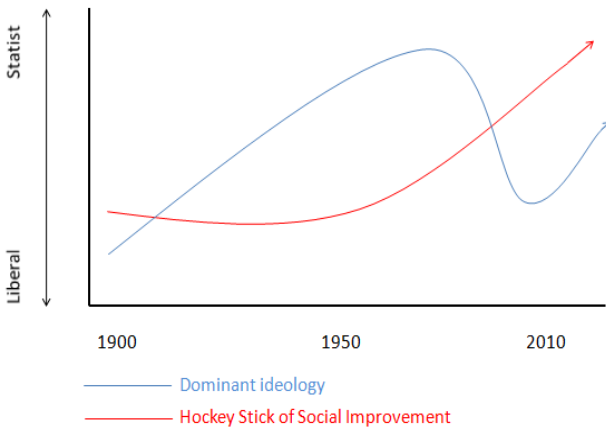


**Figure 5b: The last panel of the mural portrays the destruction of the Bolivian Central Bank and its liberal ideas.**

**Source: Brian Norris photographic archive**

A shift away from the fourth wave of liberalism in Bolivia has been underway since the election of Evo Morales in 2005 (Castañeda, Gamarra, Fernández, Madrid).

During the 20<sup>th</sup> century, this ideological oscillation does not appear to be strongly correlated with the progressive and unidirectional nature of social indicators during the century. Below is a conceptual diagram showing this disjuncture.



**Figure 6: Dominant ideology compared with social improvement**

Second is the Palimpsest Model, which holds that Bolivian society is a repository for old ideologies that never fully die out. Bolivia has been home to liberalism, Keynesianism, Vasconcelos/Mariátegui-inspired national indigenism, institutionalized Catholic social thought, *caudillismo*, the largest Trotskyite party in the world at the start of the 21<sup>st</sup> century, and Andean ideologies from pre-Incan times, all coexisting irrespective of contradictions. June Nash wrote that Bolivian tin miners combined Marxist, indigenous and Catholic belief systems and practices with little sense of dissonance (6–10, 322). George Gray Molina argued that one could simultaneously perceive liberalism, indigenous practices, and *caudillo* politics in POCOATA, northern Potosí, where he did his doctoral work (359). A former Bolivian president called the country a “Galapagos islands” of ideologies. Similarly, Charles W. Anderson used the phrase “living museum” to describe overlapping ideologies in the Latin American region. The Palimpsest Model no doubt conveys some element of truth in its description of Bolivian ideology, but because of its very nature as non-progressive it does not explain the Hockey Stick of Social Improvement any better than the Pendulum Model.

## A Methodological Digression

Epistemology is what we know and how we know it. Some hold that different groups simply perceive the world differently. This perspective is old. It was keenly perceived by the French aristocrat, Alexis de Tocqueville, when he observed in 1830, in *Democracy in America*, that the French nobility believed that commoners had a way of seeing the world that was essentially different from their own.<sup>8</sup>

By contrast, my analysis assumes that there are objective phenomena that indigenous Bolivians, *cholos*, foreigners, elites and non-elites can mutually observe and comment upon intelligibly. For instance, Aymara distinguishes between a past action that someone observes directly and one reported from another source. If one mistakenly uses the eye-witness tense to describe the actions of Simón Bolívar, the person would be called a “liar” by the Aymara-speaker.<sup>9</sup> And the

<sup>8</sup> This is a recurring theme throughout Tocqueville’s work, but it is perhaps best represented by his consideration of Madame de Sévigné’s letter to her daughter (Tocqueville 535-539).

<sup>9</sup> Juan de Dios Yapita. Personal interview. La Paz, July 2003.

Quechua phrase “Ama suwa, ama llullaq, ama qella,” is translated as “Don’t lie, don’t steal, and don’t be lazy.” After three and half years working with Quechua-speaking subsistence farmers in northern Potosí, I cannot discern any difference in the Andean conception of *qella* and that of the North American conception of “lazy.”

Secondly, one can have a great appreciation for the value of detailed observation of unique aspects of Bolivian society, such as the tendency of *campesinos* to pronounce “I’m going” as “ree-SHA-nee” in the Charcas II province of northern Potosí while pronouncing it “ree-SA-nee” in the Chayanta IV province. But a broader, interpretive analysis, such as the current one, can effectively complement more detailed analyses.

## Material Explanations

Analysts of Bolivia have favored material explanations for a number of historical phenomena and we must consider the possibility that material factors explain social evolution. For instance, the liberal turn of the 1860s has been explained as a result of the decline in importance of the tribute tax, which had been paid mostly by indigenous Bolivians and had traditionally served as a guarantee of their collectivist traditions (Klein 2004, 105; Langer 18). The Federalist War of 1898–1899 has been explained by structural changes in the Bolivian economy as the ascendant La Paz and Oruro tin miners displaced the declining Sucre and Potosí silver miners. Evidence of the superficiality of ideas for participants is seen in the fact that the La Paz/Oruro contingent dropped its previous support of the liberal governing principles of federalism upon coming to power (Klein 2004, 156, 160–161).

However one potential materialist explanation for political regime change that Bolivian scholars have missed deals with the statist period of 1952–1985. This period can be further divided into two sub-periods. The first began with the ideologically-motivated statist Revolution of ‘52 (Alexander; Whitehead). The second was the less ideological 1964–1982 period of authoritarianism. It is likely that the 1964–1982 period was largely an ad-hoc response to the most intense period of social dislocation associated with rapid modernization. For instance, Bolivian population increased 71% from 1950 to 1976, growing from 2.7 million to 4.6 million, and thus constituted the most intense period of population

growth in the 20<sup>th</sup> century. The urban population increased 172%, from 700,000 in 1950 to 1.9 million in 1976.<sup>10</sup>

The classical statement of authoritarian modernization comes from Samuel Huntington's 1968 book, *Political Order in Changing Societies*, a work largely unknown to analysts of Bolivia despite its dedicating twenty-five pages to a comparison of the Bolivian and Mexican revolutions, nine to Bolivia alone (Huntington 308–333).<sup>11</sup> Huntington argued that rapid socioeconomic improvement in late-developing countries often led to political instability as new actors were mobilized into politics more quickly than they could be socialized into the norms of existing political institutions or more quickly than these political institutions themselves could change. The social instability resulting from this disjuncture between society and political institutions would often lead to authoritarian politics (Huntington 41).<sup>12</sup>

For instance, speaking of the 1964–1982 authoritarian period, an educated middle-class professional in the Munaypata district of La Paz denounced the abuses of the dictatorships but also fondly remembered the order that they brought to the burgeoning La Paz metropolis. He observes: "They would take the urinating drunks off the street corners and place them in the central stadium to sober up. These drunks would party in the stadium until they sobered up in the morning and then would be let free."<sup>13</sup> In previous times, these individuals would have been in rural areas.

There is some evidence in Bolivia to support this sort of materialist explanation in the social sector too. For instance, in the 1970s Bolivian elites began to organize rural potato seed banks, which are today considered important forerunners to so-called microfinance in the country (Rhyne 57–58). One elite man responsible for the organization of these philanthropic entities in the 1970s believed himself at the time to be responding to increasing poverty in the country. He notes: "We had to

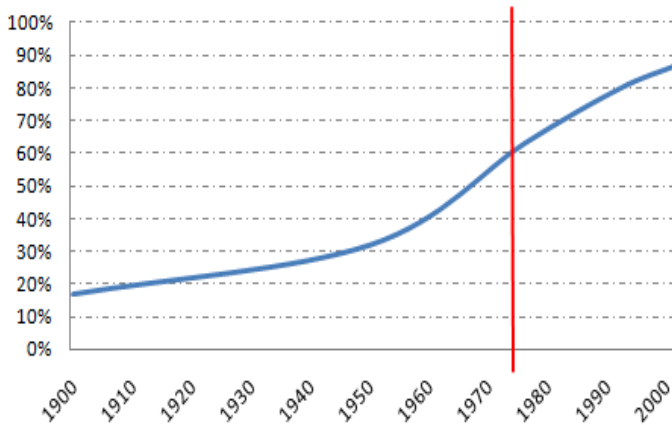
<sup>10</sup> "Cuadro N° 1" (INE 2001a). Klein (2003, 238-239) identifies the 1950–1976 period as the most intensive period of modernization in Bolivia.

<sup>11</sup> For instance, Oxford historian Alan Knight does not cite Huntington in his comparison of the Bolivian and Mexican revolutions "Domestic Dynamics."

<sup>12</sup> Bolivian scholars have not made similar connections. For instance, Roberto Laserna in "El 'Estado' Boliviano 1971-1978" (1992) calls attention to the patronage politics of the Banzer government, which channeled resources to Santa Cruz, and separately notes urban protests (57, 76) without reference to socio-demographic improvement.

<sup>13</sup> Personal interview. Munaypata, La Paz, July 2003.

respond to Bolivia's extreme poverty. We could no longer ignore it."<sup>14</sup> In fact, social indicators had already begun to dramatically improve by the time Bolivian elites began to focus on poverty alleviation schemes like seed banks.



**Figure 7: The red line is placed at 1975, and represents a median date for the development of rural seed banks. The blue line represents the literacy rate in the country. See Rhyne (57-8) for an estimation of the timing of the development of rural seed banks, and note 2 above for data sources for literacy rates**

It is more probable that the Bolivians were experiencing what an older tradition of sociology called anomie or inquietude caused by the normlessness resulting from rapid social change (Durkheim 242 ff.). In this case, anomie was associated with the breakdown of traditional social structures (described below) inherent in Bolivia's modernization process. Elites and middle-class Bolivians interpreted the incipient shanty-towns on the edges of urban areas as poverty, but in fact this rural to urban migration was made possible by improving agricultural techniques, improved transportation. For instance, Máximo Cisco's *Laymi ayllu* was isolated from Cochabamba by a two-week donkey trip before the 1950 construction of a truck-passable road cut the trip to one day. Thus, the

<sup>14</sup> Personal interview. La Paz, August 2008.

notion of “poverty reduction” only entered the consciousness of Bolivia’s urban elite once the previous generation of Máximo Ciscos had already lifted themselves up from rural poverty by coming to the city.

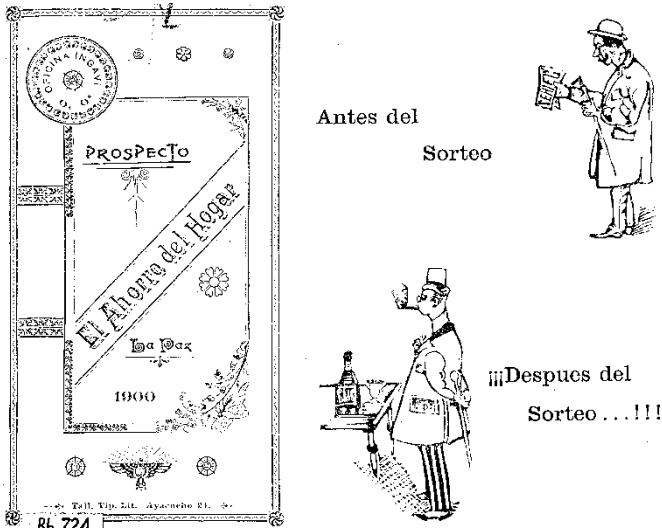
## Ideology and Social Improvement Revisited

These materialist explanations no doubt convey some element of the truth, but the ideas that people held in their minds must complement the material explanations. Archival evidence suggests that liberalism was a deeply principled concern for some Bolivians. For instance, visiting archives in La Paz, Sucre and the U.S. one is struck by the effusion of prospectuses, shareholder reports and advertisements for popular savings schemes appearing on or around 1900, just after the Federal War of 1898–1899. A pamphlet for *El Ahorro del Hogar*, a voluntary and private savings association established in 1900, is representative of the schemes that liberal reformers promoted (fig. 8). Organizers stated that the institution “has been founded with the objective of promoting thriftiness among all of the social classes of the Republic.”<sup>15</sup> The “Ahorro” lasted only ten years (Benavides 77),<sup>16</sup> but this was a relatively long run for a credit institution of this sort at this time in Bolivia.

The care with which authors interpreted liberal ideas for their countrymen in documents like the one mentioned above and the level of engagement with the ideas liberal thinkers like Smith evidenced in documents as early as 1858 (Mallo 1) suggests that reference to liberal principles was more than just an *ex post* attempt to justify a change of rule from one elite group to another in 1899. More research is needed on liberal ideology for the 1899–1920 period.

<sup>15</sup> “Primera Memoria Semestral Presentada [...]”; A similar surge of archival documents evidences the mid–19th century liberal period. See, for instance, “Reclamación del Banco Nacional de Bolivia [...]”

<sup>16</sup> Corroborating Benavides, I find no records after 1910 for the Caja. “Vigésima Memoria semestral, Presentada [...]” (1910) is the last available in ABNB. This endorsement matters because some historians have deprecated Benavides’ work due to his inconsistency in specifying sources (Klein 2004, 294).



**Figure 8: From Pauper to Prince: This prospectus features a cartoon that helps would-be participants imagine self-improvement through saving**  
 Source: "Prospecto: El Ahorro [...]"

## Religion and Social Improvement

In a country that had a literacy rate of 18% in 1900, the study of philosophical works must have been a luxury of a small minority of Bolivians, few of whom would have belonged to Bolivia's indigenous majority or growing *cholo* class. It is therefore necessary to focus on mass ideology, and the best proxy for mass ideology is religion.<sup>17</sup>

We have a reasonable record of religion, including for indigenous Bolivians, going back to the first days of the conquest. Spanish priests began to write about indigenous religious practices in the Andes in the 16<sup>th</sup> century, a torch that was passed to secular anthropologists in the 20<sup>th</sup> century. The great historian of Potosí, Lewis Hanke, wrote that "the

<sup>17</sup> Religion differs from ideology in its reference to the supernatural, but this difference is not relevant for the analysis at hand.

histories [and ethnographies] that religious people and others wrote, no doubt were tendentious at times, but these people were the first anthropologists of the new world" (6).

Evidence exists to suggest that the pattern of religious evolution in Bolivia better fits the trend of social improvement than that of elite ideologies. While we lack a comprehensive study of long-term religious evolution in Bolivia, one such socio-anthropological study covering pre-Incan times to the present exists for the highly comparable Peru. The study finds that Peruvian society increasingly moved from the polytheistic natural religion, ancestor worship and folk Catholicism (all three being virtually identical for this analysis)<sup>18</sup> that have traditionally been associated with indigenous culture, to monotheistic Christianity in the second half of the 20<sup>th</sup> century. Within Christianity, evangelical Protestantism became increasingly important in Peruvian society in the second half of the 20<sup>th</sup> century (Spier).

There is evidence to suggest that the religious evolution described in the Peruvian case is present in Bolivia. One study found a long-term decline in the practice of the *tinku*, a pre-Incan ritual intimately linked with indigenous religion in Bolivia and throughout the Andes (Norris). And Protestantism in Bolivia began to take off during the mid 1960s during the most intensive period of modernization (Bonino 595). Two independent surveys in Bolivia estimated that by 2001 about 14% to 16% of the Bolivian population self-identified as Protestant, and one suggested that up to 36% of the church-going population of Bolivia were Protestant by 2001.<sup>19</sup> And the Vatican II reforms of the 1960s were important, as will be argued below.

## Three Ways Religion Affects Social Change

If a temporal correlation between religious changes and social improvements in Bolivia in the 20<sup>th</sup> century exists, as the evidence above suggests, then what are the specific mechanisms linking the phenomenon

<sup>18</sup> Weber (1978, 410) mentions references to "Mother Earth" as generic in agricultural societies' religions.

<sup>19</sup> INE, "56.55% De la población [...]". This report estimates that 16% of all Bolivians identify themselves as evangelical Protestant. Independently, Seligson (67) estimated that 14% of the Bolivian population was evangelical Protestant. The 1992 Bolivian Census estimated that 11% of all Bolivians were evangelical protestant. See Table "6.6 RELIGION" (INE 1992, 58).



of religious change to social improvement? There are three potential mechanisms for religious doctrine to affect social change: 1) a direct effect on social indicators, such as literacy; 2) an effect on the scale of social organization, as seen with the difference between monotheism and polytheism; and 3) the effect that Vatican II had on the scale and form of beneficial social organizations, such as credit institutions.

First, the most uncontroversial relationship between religion and social improvement might be seen in Protestantism's effect on literacy. According to Protestant doctrine, an individual has a direct relationship with God, unmediated by religious specialists. It is therefore necessary that even layman be able to read the Bible in order to mediate his own direct relationship with God. For instance, in comparative analysis one finds it difficult to explain the relatively high literacy rates in otherwise rural and poor mono-crop agricultural societies such as Texas at the beginning of the 19<sup>th</sup> century without reference to Protestant heritage (table 1).

Year	Country/group	% literate
1900	U.S.	89%
1900	Texas	85%
1910	African Americans in Texas	75%
1910	Mexico	32%
1916	India	10%
1920	Brazil	31%
1900	Bolivia	18%

**Table 1: Adult literacy in comparative perspective<sup>20</sup>**

<sup>20</sup> For U.S. and Texas literacy figures in 1900, see "Statistics of Population," in *Census Reports Volume II, Twelfth Census* [...] (xcviii, c). For African American literacy in Texas in 1910, see Cummings (413–415). For Mexican literacy for those over the age of 12 in 1910, see *Tercer censo de población* [...]; For Brazilian literacy for those over the age of 7 in 1872 and 1920, see *Recensamento do Brazil* [...]; For number of Indians who could read in 1916, see Wolff (88). Wolff cites the Indian census of 1916 as his source. In theory, the fact that censuses cited employed varying cut-off ages ranging from 7 to 20 years for determining literacy might challenge the comparability of their results. In fact, the differences are so great between U.S. literacy and the countries

Protestant promotion of Bibles and reading in Bolivia goes back to at least the mid-19<sup>th</sup> century. For instance, L. Matthews of the British and Foreign Bible Society made a colportage journey (i.e., a journey to hawk Bibles) to Potosí, Cochabamba and La Paz in 1827. An American Bible Society agent named Mr. Milne, made a trip to Bolivia in 1883 in which he visited Tupiza, Potosí, Colquechaca, Sucre, Oruro, and La Paz and put into circulation thirty cases of Bibles, for which, he reported, the “Roman clergy” and Bolivian civil authorities persecuted him. Milne would make more than twenty journeys to Bolivia from 1883–1902. By 1907, another missionary group, the Bolivian Indian Mission (BIM), had established itself in the heavily indigenous town of San Pedro de Buenavista, northern Potosí. A Scotch-Irishman named John Allan from the BIM would translate the New Testament into Quechua from the San Pedro headquarters (Browning, et al; Hudspith; Read, et al 108–112, 220; Hamilton 30–31, 33). Even today when one attends a typical Protestant service in urban Sucre, the usher places a Bible written in Spanish in front of attendees at a sermon in an important symbolic act.<sup>21</sup>

In addition to producing and distributing Bibles, missionaries were concerned with Bolivian education in general and literacy in particular. For instance, one missionary book from 1930 reported that, based on the author’s analysis of the 1900 census of Bolivia, the Potosí Department had the highest illiteracy rate at 92% while the Santa Cruz Department had the lowest at 41%, and Bolivia had overall rate of 70% (Browning 120–121). This missionary emphasis on education led to the creation of schools that benefitted at least a few Bolivians who otherwise would not have had access to education. For instance, one Western anthropologist writes about Pablo Choque, a man born to an indigenous family near Lake Titicaca who is now an old and successful owner of a modern home in El Alto. He attended a rural school that Baptist missionaries built and ran in the 1930s, at a time when few peasants of his generation attended school (Gill 63–64). Protestants ran schools in urban areas too. In 1921

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mentioned that the basic assertion that even agricultural areas in the U.S. were more literate than these societies seems reasonable. Additionally, a review of the data in a municipal census from 1930 in El Salvador, which recorded literacy data for 15 separate age groups, suggests that varying the age limit does not affect literacy much. For instance, changing the cut-off age from 8 to 15 changed the literacy rate from 42% to 41%. See *Primer Censo de Población*.

<sup>21</sup> Personal observation. Sucre, October 2009.

there were about 300 students in private Methodist American schools in La Paz and Cochabamba (Schurz 38).

Second, there is a link between religion and overall scale of social organization. Sociologists have theorized that monotheistic religions like Islam and Christianity have historically been more propitious than polytheistic religions at supporting the large-scale social organization that is necessary for a relatively high division of labor (Weber 1978, 415–420). Obviously, a complex society with a relatively high division of labor is going to be better at delivering vaccines and medicines than a society with a lower division of labor.

Comparison of modern credit institutions in Bolivia with the *ayllu* illustrates this dramatic difference in scale. Credit institutions are defined as the temporary sharing of assets among more than one person (Weber 1978, 80–83). In indigenous Bolivia, temporary sharing of assets was traditionally accomplished within *ayllus* as exemplified by redistributive practices such as the *alsa* — a ritual divestment of property by *ayllu* headmen (Watchtel and Ciezar 139). *Ayllus* represent a form of social organization that Emile Durkheim called a segmentary lineage or self-contained political and economic units evocative of the segments on an earthworm which are individually identical, but collectively compose a much larger entity (Ch. 6). Size of the *ayllu* varies depending on region. For instance, Altiplano *ayllus* tend to be larger than valley *ayllus*. But the striking characteristic of Bolivia's *ayllus* is that their size has remained relatively stable over time, hovering at about ten to twenty thousand members. One study estimated that about 10,000 people were members of the Macha *ayllu* in 1575 and another study estimated that about eight thousand people were members of the Jukumani *ayllu* in 1985 (Platt 5; Godoy 724).<sup>22</sup>

To get an idea of the difference in scale between the social arrangement that the *ayllu* represents, and that of more recent institutions with a higher division of labor, consider participation in modern credit institutions. By 2008, 3.4 million Bolivians, or about 80% of the Economically Active Population, had deposits in a financial institution that records individual identity.<sup>23</sup> Conceived another way, up

<sup>22</sup> In *Espejos y maíz*, Tristan Platt mentions that “a 1575 Spanish document” estimated that the Macha *ayllu* had about 10,451 members in 1575 (Platt 5. Editors’ translation).

<sup>23</sup> Fernando Prado, personal phone conversation, 17 July 2009. These data are more updated than data in Prado (14–15). EAP estimation is from the INE website [www.ine.gov.bo] accessed April 2 2010.

to 3.4 million mostly anonymous individuals were cooperating through these highly abstract economic institutions. The difference in scale between the cooperation represented by an institution encompassing ten thousand people and one encompassing 3.4 million people is so great as to constitute a difference in kind. John Murra, the foremost expert on Incan economic institutions, has noted that barter economy of the *ayllu* historically has tended to be mutually exclusive with large scale market economic institutions (Murra 86).

Religious rituals serve to integrate the *ayllu*, and abandonment of one entails abandonment of the other. Olivia Harris in 1977 described one family's decision to leave their *ayllu* and abandon the *tinku* in northern Potosí to participate in the market economy of Cochabamba: "[T]wo Laymi *likina* [i.e., lower elevation] hamlets to the north of Laymi territory [...] are only a short distance from a *pueblo* [Toro Toro] from which is the final stopping-place of a weekly truck from Cochabamba, and their economic activities have gradually turned away from the *ayllu* to the city [...]" This turning away from *ayllu* barter relations to market relations based in the city had important implications for their relationship with the Laymi *ayllu* because "in the process [of turning away], they have ceased to be Laymis. That is, they have systematically broken the endogamic rule [...] They have given up their *suní* [i.e., higher elevation] holdings, and now try to avoid exchanges with kin who come in search of maize from the *suní*. They no longer fight with the Laymis in the *tinku*, and in fact now call themselves Pampas [i.e., *mestizos*], like their northern neighbors, rather than Laymis" (176, n. 9).

To summarize, the scale of a group of ten thousand people might work well for barter trade among subsistence farmers, but it does not work well for a complex division of labor that can deliver medicines and other goods necessary to achieve the social indicators seen in Bolivia after 1950. Even a medical cultural anthropologist and former Maryknoll priest who was highly appreciative of the traditional medicine of the Kallawayas would prescribe modern mass-produced medicine when needed (Bastien 1978), and nothing in my experience in northern Potosí suggests that rural Bolivians do not prefer modern medicine when it is available.

Thirdly, changes in religious doctrine can directly affect the creation of socially useful institutions, such as credit institutions. In 1858 one pamphleteer argued that a doctrinaire interpretation of Christianity in Bolivia impeded the development of credit institutions because it led to an unconditional sympathy with the debtor, the weaker of the two parties in a transaction.

Christianity appeared and it reminded people of human rights that had been forgotten: charity, the spirit of equality, brotherly love, temperance of desires, the immortal hopes of the soul, the dignity of women, forgiveness of enemies[. ...These teachings] entered into men's hearts. [This] tempered society, and the poor were aided by the rich. In a religion that declared itself the protector of the poor, it was natural that those charged with the maintenance of its doctrine [i.e., the priests] would adopt this stance, and [would champion] the clamoring of the great mass of poor people. [But with respect to] the issue of charging interest on loans, [these interpretations of Christian doctrine] were not bound by the principles of equity [i.e., equity for the lender too] and compensation for services. [These general Christian principles of protection of the weak] got confused with regard to the rigors of dealing with insolvent debtors (Mallo 1, trans. by author).

The author believed that a more balanced consideration for lenders' property rights would have promoted the development of credit institutions to the benefit of both lenders and debtors.

The Vatican II reforms of 1962–1965 represented a major change in Catholic doctrine, one that affected the development of modern credit institutions. In Bolivia in 1963 this doctrinal change led directly to the establishment of enduring modern credit institutions in the form of Catholic credit cooperatives (figs. 9 and 10).

The credit cooperative movement was undeniably Catholic. Nearly all of the cooperatives had religious names: Jesús Nazareno, San Martín, La Merced, San Carlos, San Roque, etc. Priests were almost always involved in the founding of these institutions. For instance, Father José Beauseleil was instrumental in founding FENACRE, a trade association of Catholic Credit cooperatives in Cochabamba in 1964 (Tellez 1; Ocampo), and Fathers Roberto Valda Palma, René Poveda Nova and Alberto Rizzoli served as officers in credit cooperatives founded in Sucre and Cochabamba in 1963.



**Figure 9: The San Carlos Borromeo Cooperative, Cochabamba 2009**  
Source: Brian Norris photographic archive



**Figure 10: Church, Cochabamba 2009**  
Source: Brian Norris photographic archive

At the broadest level, Vatican II devolved power to laypeople. For instance, it promoted giving mass in vernacular languages such as Spanish or English instead of the dead language of Latin and making the liturgy more accessible to the poorly-educated through printing simplified expositions of religious principles and authorizing decentralized bodies to elaborate these materials (Dussel 551). This generic representation of Vatican II doctrine was consonant with the Bolivian interpretation of Vatican II, which can be seen in documents from the 1970s dealing with political affairs. One pamphlet from Bolivia argues:

We, the bishops, hope that laypeople [take] a more direct responsibility for and a greater participation in the *reform of the temporal order* [i.e., the world we now live in, emphasis added]. Vatican II recommends to them to fully take up the task that is their own, *without passively waiting orders or directives from the hierarchy* [emphasis added], given that it is no longer the responsibility of the latter to guide Christians [i.e., the laypeople] in choosing or rejecting specific programs or political parties (Marins 991).<sup>24</sup>

The credit cooperative movement of the 1960s was also undeniably linked with Vatican II. First, the timing of the movement is hard to explain without reference to Vatican II. Second, foundational documents of specific credit unions like San Carlos Borromeo, in Cochabamba, and San Roque, in Sucre, either explicitly mention Vatican II or use language that is recognizable as that of Vatican II (San Carlos 1968; San Carlos 1964; San Roque 1963). The influence of this doctrine is further seen in the management structure of the organizations. For instance, the San Carlos Credit Cooperative in Cochabamba in 1963 created a “Bad Debts Committee” composed entirely of laypeople. This decentralization likely had important consequences. The committee, of similar social background and education to borrowers, adopted “rigorous [collection] measures that would stem the losses associated with bad debts” (San Carlos 1968, 152, 155), an act that would seem to be in stark contrast to the highly sympathetic position towards the debtor mentioned in the pamphlet above.

It is unlikely that this stricter stance toward the debtor would have been possible absent a decentralizing reform like Vatican II. For instance, language found in documents from credit institutions like that of “Saint Anthony of Padua Savings and Loan,” founded in 1914 by Franciscan priests in Sucre, suggests that they emphasized leniency in dealing with

<sup>24</sup> Translation by author. See also Smith (157 and 172–177) for descriptions of reforms made in Bolivia.

bad debtors (“Estatutos de la caja [...] 1914”). The removal of this ideological hurdle to more effective organization in these credit institutions likely contributed to their growth in size and complexity.

Some U.S.–based development professionals at the beginning of the 21<sup>st</sup> century dismiss the Catholic credit cooperatives, noting that they only make up about 8% of the market today and still have atavistic hang-ups about usury (Rhyne 58). However, this pessimistic assessment fails to properly recognize the novelty of these institutions that developed autonomously in the 1960s when no such urban-based popular credit institutions existed. And Catholic credit institutions like Cochabamba’s San Carlos Borromeo and Sucre’s San Roque proved to be exceptionally resilient, as they survived the hyperinflation of 1985 while more fragile institutions like the 1904 Banco Agrícola folded after only thirteen years in much less tumultuous times.<sup>25</sup>

Finally, to the extent the dominant religious tradition becomes more homogenously Christian in Bolivia, the social impact of the above three effects is likely magnified.<sup>26</sup>

## Conclusion: The Independent Impact of Ideas

Marx believed that societies made up religious myths to assuage their concerns stemming from powerlessness before nature. When organizational and technological improvement tamed the vagaries of nature, religion would disappear or be otherwise modified (Marx 1904, 310–311; Marx 1915, 15, 91–92, 93 n. 2). By this logic, when Sebastián—the *campesino* suffering the hail storm above— moves to the city, it makes sense that he abandons or modifies the ancestor worship he practiced in the *ayllu*. By contrast, evidence from this case suggests that changes in religious ideas can cause this material change. This is so because these ideological changes often *precede* material changes. For instance, Máximo Cisco converted to evangelical Protestantism in 2003 *before* he moved to the city. Here Weber’s thesis that emphasizes the

<sup>25</sup> “Banco Agrícola: Primera Memoria Semestral [...]”; Director of Banco Agrícola (1911); Benavides notes that the thirteen years of survival was exceptional for this time (79–80).

<sup>26</sup> On the importance of religious homogeneity independent of the content of religious doctrine, see Weber (2002, 203–220), “‘Churches’ and ‘Sects’ in North America.”



independent impact of ideas better explains the Bolivian social changes than materialist arguments.

Additionally, religion for Marx was an “opium of the people,” a story elites made up to pacify the masses in an exploitative social order. But a tour of evangelical Protestant meeting facilities in La Paz and Sucre quickly shows them to be eminently humble compared with the ornate Catholic temples. This suggests that Protestantism in Bolivia emanates from below, not unlike Daoism, which developed out of folk beliefs as a kind of protest religion for non-elites opposing the elite religion of Confucianism in China (Fukuyama 140). Thus, the Bolivia case additionally suggests that any emphasis on elite ideology—including neoliberalism and its competitors—should be complemented by an emphasis on mass ideology.

Religious ideas are one factor affecting social outcomes in Bolivia as resource endowments, external factors, and historical contingency matter too. Future research should focus on determining the relative contributions of these factors to social change in Bolivia, especially in the growing urban areas. In particular, we need more qualitative studies of the impact of Protestantism and Vatican II.

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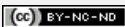
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