South America is the victim of a bad start. It was never settled by whites in the way that they settled the United States. . . . The masterful whites simply climbed upon the backs of the natives and exploited them. Thus, pride, contempt for labor, caste, social parasitism, and authoritativeness in Church and State fastened upon South American society and characterized it still. It will be yet long ere it is transformed by such modern forces as Industry, Democracy, and Science. —EDWARD A. ROSS, South of Panama (1915)

In this chapter I present sociologist Edward A. Ross’s South of Panama (1915) as a significant contribution of the emerging U.S. sociology to the “rediscovery” of South America. The race factor, labor, and sociability constituted the axes organizing Ross’s particular vision of South America. His “discovery” of racial oppression, labor servitude, and medievalism in the Andes was related to his progressive ideological agenda. Ross disseminated the information he had collected in South America in his sociological tracts and college textbooks. In his textbook The Outlines of Sociology (1923), he turned South American nations into examples of greater sociological generalizations about the condition of Euro-American modernity.

Ross was a leading sociologist of the progressive era. A disciple of Lester Ward, he contributed greatly to the consolidation of the discipline in the
United States, together with other pioneers such as William Sumner, John Gil-lin, Albion Small, Franklin Giddings, and Charles Cooley. In 1891, after a year of study at Berlin, he took a doctorate at Johns Hopkins, and later taught at Stanford and Chicago before settling at the University of Wisconsin (1906). There, he taught sociology for thirty-one years, becoming chairman of the newly created Department of Sociology and Anthropology in 1929. He was a leading figure in the American Sociological Association and one of the founders of and major contributors to its journal, the American Journal of Sociology.

Among scholars, Ross is remembered for having defied the corporate university in defense of academic freedom. Opposed to the railroad company practice of hiring cheap Chinese labor, Ross entered into a dispute with the Stanford family that cost him his job (Downing 2005). This triggered one of the first scandals around academic freedom in the nation's history. He is also known for his public advocacy of restrictions to mass immigration. Ross warned his contemporaries that unchecked Chinese immigration endangered the standard of living of “American” workers, and he wrote about the cultural primitivism and racial inferiority of Southern and Eastern European immigrants. Though controversial, his works dealing with immigration—Changing America (1909), The Old World in the New (1911), and his 1911 Report to the Congressional Immigration Commission—were influential in the U.S. adoption of immigration quotas in 1921 and 1924. His unhappy coinage of the term race suicide—used also by President Theodore Roosevelt—continues to be the object of critical attention.

According to the sociologist J. O. Hertzler (1951), Ross was one of the last “system-builders” of American sociology. Ross’s theorizing concentrated on social phenomena and social processes. Influenced by contemporary currents of thought in Germany and France (Georg Simmel, Émile Durkheim, and Gustave Le Bon), Ross tried to build the edifice of U.S. sociology as a composite of many elementary parts. He thought sociologists should gather data on “cases” in order to produce generalizations or “regularities” that substituted for unassailable “social laws.” To him, society was composed not of individuals or groups, but of “social types” constantly under the pressure of “social forces.”

Ross’s works on foreign societies are less known, yet in my view they constitute the bedrock of his sociological theories. His “sociological portraits” of China, Mexico, Russia, South America, and Africa helped acquaint U.S. Americans with areas later known as the ‘Third World.’ His travels across half the globe supplied him with a wealth of observations and insights about foreign lands. Processed in the sociologist’s comparativist lab, these “social facts” created the basis for contrasting hypotheses about “social forces” and “social pro-
cesses” in modern society. In addition to being a pioneer social theorist, Ross was a "sociological interpreter to Americans of foreign peoples and cultures" (Hertzler 1951, 598).

As one of the first transnationally informed sociologists, Ross contributed to the enterprise of rendering South America visible to U.S. Americans. In 1914 he took leave from the University of Wisconsin to travel along the western coast of South America. He visited Colombia, Ecuador, Peru, Bolivia, and Chile, then crossed to Argentina. His sociological portraits of these nations are condensed in South of Panama (1915), a book that combines features of travel writing, sociological observation, and political commentary. In the Andean countries Ross found nations corroded by landlord despotism, labor servitude, and racial exploitation. In Ecuador, Peru, and Bolivia, indigenous peoples were living in conditions so primitive they resembled medieval Europe. Chile, a mixed-raced country, was making some progress, while Argentina, a white settler colony, had already advanced along the road to progress and civilization. South of Panama underscores the legacy of Spanish colonialism as constitutive of Andean backwardness.

While other disciplines produced regional knowledge—for example, history and geography developed the subfields of Hispanic American history and South American geography, respectively—sociology did not. Yet the study of South America contributed to the formation of a comparative international sociology. South of Panama was part of a broader study of world problems and trends that included China, Mexico, and Russia. Ross’s sociological portraits of world regions constituted the elementary parts of a project of “international sociology,” a project for a science of society based on “cases” construed through direct observation in different areas of the world.

Before Direct Observation, Race Generalization

Before traveling to the region, Ross used the term “South America” to evoke a population made up of Catholics, uninstructed in self-government, and endowed with traits characteristic of “Latin peoples”: indolence, inability to save, and a preference for feasting. A racial polarity between whites and nonwhites marked Ross’s sociological comments about Latin Americans. To this extent, “South America” was not different from Mexico, Central America, or the Caribbean. Their populations lived under quite primitive conditions, without incentives to work harder and with no vision of the future (Edward A. Ross 1901a, 76).

In contrast, white U.S. Americans possessed the “energy” that was proper to regions receiving free European immigration. In 1901 Ross wrote an influential
essay, “The Causes of Race Superiority,” wherein he examined this superiority of white U.S. Americans over other races. U.S. Americans were blessed with a competitive and egalitarian culture that praised individual success over inherited social status. The conquest and settlement of the West had rewarded the industrious, the self-reliant, and the entrepreneurial. In addition, U.S. Americans were highly successful in mastering industrial technology.

Energy, self-reliance, foresight, and stability of character formed the basic character traits of “superior races.” The Anglo-Saxons, possessing all the attributes of the mercantile races, also had the strength, the determination, and the foresight to settle new territories and control their natural resources. While the Britons had built a large overseas empire, white U.S. Americans had conquered the West and then successfully embraced the Industrial Revolution. Spanish Americans, on the other hand, lacked the crucial attributes of self-control and reflection needed to master industrial technology: Mexicans, Colombians, Venezuelans, and Brazilians all shared the traits of the “mañana culture.”

In the era of empire, Ross argued, determination, productivity, and energy put “superior races” in command, while the absence of these traits made other races dependent and subservient: “Latin sociability is the fountain of many of the graces that make life worth living, but it is certainly a handicap in just this critical epoch, when the apportionment of the earth among the races depends so much on a readiness to fight, trade, prospect or colonize thousands of miles from home” (Edward A. Ross 1901a, 84–85). To preserve their superiority, imperial nations needed to restrain interracial marriages to prevent miscegenation. Spanish and Portuguese civilizations had promoted racial mixing, and, as a consequence of this mistaken policy, their empires declined and fell apart. In the United States, by contrast, racial separation resulted in “the highest type of civilization” (ibid., 85). Through miscegenation, unwanted immigrants (Italians, Spaniards, and the Chinese) could steal away the energy of the industrial (white) U.S. America. If, for the sake of maintaining a certain standard of living, a nation reduced its birth rate and allowed “inferior races” to enter the country, the future of the mainstream population was at risk. Ross called this policy “racial suicide” (ibid., 88).

Progressive U.S. America

Ross’s progressive credentials are well established. Despite his support of selective immigration, his views on workers’ conditions, the situation of women, child labor, monopolies, and higher education projected the agenda of a more egalitarian society. He looked at South America through a progressive lens.
and found it saturated with aristocratic government, racial oppression, and forced labor. Thus, his eugenicist progressivism rendered a pessimistic yet compassionate view of indigenous Andeans while projecting an optimistic portrait of “white” Argentina and Chile.

Before traveling to South America, Ross wrote an influential book about the challenges posed to contemporary U.S. society by internationalization and capitalist development. *Changing America* (1909) presented the agenda of the U.S. progressive movement to ordinary “Americans” so that they could better evaluate world contemporary tendencies. While deploying a broad-ranging agenda on race, gender, labor, and democracy on the world scene, Ross grounded his perspective on a narrow, parochial center: the rural communities of the U.S. Midwest. The book identified several world trends that were bound to affect the way of life, the social interactions, and the political rights of ordinary U.S. Americans, among them the influence of big business in politics; the great social inequalities created by mass-production capitalism; the gradual emancipation of women; new protective labor legislation; and the government’s new interest in social welfare.

In the first trend Ross saw democracy expanding worldwide. Populations long ruled by monarchs and despots (particularly in Asia and the Middle East) were now demanding responsible popular government (Edward A. Ross 1914 [1912], 21). In this terrain, progressive U.S. scholars had much to teach the world. Democracy was not just a matter of popularly elected government, but of the rule of “mature public opinion.” Indeed, only an enlightened public opinion, guided by progressive intellectuals, professionals, and bureaucrats, could check business power.7

The strengthening of secular government was a second important world trend. Everywhere in the West he observed an increasing separation between church and state, which was good news for the spread of democratic values. In particular, U.S. missionary societies promoted the expansion of democracy worldwide, liberating people from the grip of state-sponsored churches. This was an important indicator of social modernization. The significant fall in birth rates was the third worldwide tendency, and was the result of changes in family aspirations and gender roles that were themselves the product of modern life. Common folks had chosen to free up money for consumer goods or savings by having fewer children. In the United States, France, the United Kingdom, and other industrialized nations, increasing opportunities for women in labor markets tended to delay marriages and thus reduce birth rates.

Ross warned that this demographic trend would trigger a dangerous racial dynamic. The rapid demographic growth of Asia, Russia, and Spanish
America could well displace whites from the center of the civilizing process (Edward A. Ross 1914 [1912], 37–39). In the United States, massive immigration from Southern Europe and Asia threatened to undermine centuries of progress. Race deteriorates a population, wrote Ross, “if the successful withhold their quota while the stupid multiply like rabbits” (ibid., 45). Italians, in particular, showed high fertility rates. To counteract these demographic tendencies, Ross proposed that the United States restrain mass immigration.

A fourth important dimension of Western modernity, connected to the decline of fertility, was the emancipation of women. At the time that Ross wrote, five million women were gainfully employed in the United States. While he found this a welcome development, he worried that the massive inflow of women into labor markets could jeopardize the rights of male workers and undercut their wages. Young women were disorganized, weak, and uninformed, unable to fight against factory work speed-up demands, the extension of the workday, or deteriorating work conditions (ibid., chap. 5).

Fifth, Changing America alerted readers to the dangers of “rampant commercialism.” The book indicted U.S. business for its mentality, ethics, and practices. Ross accused corporations of accelerating the work process, introducing cheap labor from non-Western nations, carelessly exploiting nonrenewable natural resources, and causing millions of work-related accidents per year. Moreover, he pointed out that business influence had reached the citadel of knowledge; its representatives sat on the boards of the most important research universities. Yet the greatest danger to democratic society was the erosion of free expression. The newspapers, increasingly funded by advertising revenues, were actually suppressing important news.

To mitigate or even reverse all these trends, Ross supported a wide-ranging social-reform agenda that provided “for the legal protection of the weak in industry, workingmen’s compensation, legal standards of housing, the regulation of public utilities, the supervision of insurance, perhaps the guaranty of bank deposits, and the taxation of site values” (ibid., 83). And in the egalitarian, farming communities of the U.S. Midwest he found the forces that could rejuvenate “American democracy.” Midwesterners had opposed the advance of Eastern capital and its corrupting influence on government. At the end of the book, however, Ross described how enterprising young men were leaving Midwest communities to migrate to the cities. “Folk depletion” was the name Ross gave to this phenomenon, raising the possibility of moral decline in the very cradle of democratic sociability.
In 1915 Ross traveled to South America himself, visiting Ecuador, Peru, Bolivia, Chile, and Argentina. South of Panama, he found societies that lacked the key elements for replicating U.S. democracy. Three main topics dominate his interpretation: (1) the race factor; (2) the existence of servile labor and great landed estates; and (3) the lack of democratic sociability. While the first two topics related directly to the Spanish colonial experience, the third factor underlined the backwardness of South America in relation to U.S. sociopolitical modernity. In the Andean region Ross encountered countries that suffered from “landlordism” (the excessive power of landlords over tenants and laborers) and premodern labor arrangements. Only in Argentina did he find modern social relations (free wage labor) and a prosperous farming middle class.

While on occasion Ross steps back from the racial explanation to analyze culture, sociability, and government, the whole book is permeated by racial pessimism. Race served to explain the progressive or stagnant state of the different countries Ross visited. To Ross, Andean nations still retained “feudal” features inherited from colonial times. Big landed estates, peons trapped into debt, and various forms of personal servitude were defining characteristics of Andean South America. Ross also paid attention to democratic sociability, the conditions that made people cooperate for the common good. In this regard, too, he found the societies of South America undeveloped. They lacked a universal system of elementary public education, a competitive free press, modern political parties, and universities that fostered the “collegiate spirit.”

**THE RACE FACTOR**

Traveling south along the Andes, Ross also encountered an incredible confusion of social landscapes. All of South America seemed saturated by miscegenation. Diverse types of “mixed breeds” held social progress in check. Racial mixture was the crucial difference separating Spanish America from Anglo-America. And unlike in the United States, in Spanish America the many gradations of skin color prevented the development of a clear “color line.” Ross tried to bring some order to this confusion by arranging his commentary and description by color, from black to Indian-mestizo to white. Then, on the basis of these racial gradations, the U.S. American sociologist divided South America: Andean countries remained trapped into the colonial past, while Southern Chile and the Argentine Pampas seemed to live in contemporary modernity.

In these multicolored societies blackness was the marker of uncivilized autonomy. Remaining separate from white and creole society, African South
Americans remained premodern in their customs and sociability. In the jungles of Choco, not far from the Panama Canal, lived a population of former slaves, in conditions that combined primitivism with independence from other groups. Men and women wore few clothes, built their houses with bamboo canes, and produced what they consumed. The Choco blacks lived a life of abandonment and indolence, enjoying freedom (Edward A. Ross 1915, 4). Having been slaves, they refused to engage in wage labor. Even where blacks lived among whites or Creoles, they maintained a level of autonomy and pride.

To the south, in other Colombian towns, residents considered blacks to be good laborers. In Cali, in the Cauca Valley, the close proximity of people from different races attracted Ross’s attention. Almost nude men and women, black and white, bathed in the same river. Black laborers, imbued with a sense of egalitarianism, did not tolerate rough language from their bosses (ibid., 8–11).

In contrast, in Ecuador the mestizo stood for disorder and violence. To underscore their innate violence, Ross recounted the Alfaro uprising of 1912 at Quito. Middle-class rebels staged a coup against the government, but were unsuccessful and went to jail instead. Then the cholos (mestizos) killed the jailed revolutionists, engaging in a blood orgy. Heads were cut off, bodies were dismembered (ibid., 31–32). Locals and scholars alike sought to understand what could have generated this type of violence in an otherwise tranquil town. The mestizos’ innate violence and vengefulness emerged as a possible explanation, as did a history of political instability during the nineteenth century.

Ross sought a racial form for understanding the subcontinent, but could not find easy associations between race and social, economic, and political problems. In Peru he found that new waves of immigration had complicated the readability of race. Besides the fourfold division of white, cholo, Indian, and black, now there were Asian immigrants. Sugar plantations had brought Chinese coolies to Peru, and this had added another layer of racialized subalternity to the already multicolored Peruvian nation. “Coolies” mixed with native women, giving birth to a new caste, the “chino-cholo” (ibid., 39–40). The presence of hyphenated subjects revealed Peru’s continued tradition of mixing races.

This increased racial diversity led Ross to proclaim, “There is no color line [in Peru]” (emphasis added). In Andean societies, he found, mestizos contributed diversity, violence, and disorder to the social landscape, yet they constituted only the middle ground in a larger and deeper conflict between two races: the whites and the Indians. White and “near-white” ruling classes kept the Indian majorities subordinated and marginalized. Ross blamed white elites
for holding back the Indian masses in education, political participation, and associative life.

Religiosity marked the endurance of the Spanish colonial legacy on the lives of indigenous communities. At Chincheros, a town in the Peruvian highlands, the author was so impressed by the sight of an Indian procession that he detailed it in his narrative: “The eyes of the kneeling worshipers followed the chanting procession as it wound its way about the church, and at the supreme instant of the mass they lifted their hands, pressed palm to palm, and yearned toward the altar in a mute, but passionate, adoration” (ibid., 72–73). The scene conveyed deep religiosity and devotion, similar to that of Tibetan monks. The Indians’ colorful dresses, the simplicity of their houses, and the piety of their ceremonies confronted the author with a perpetual and unchanging time. Everyday life in the Peruvian highlands still evoked the Spanish colonial past.

From his observations, Ross inferred certain features of the “Indian character”: religiosity, passive tolerance, and a subservient attitude. Over time, Peruvian Indians had learned to fear the presence of white masters. When a white man passed, they got off the road; if a strange white man spoke to them, they kneeled on the floor and begged not to be hurt. Their submissive attitude caused Indians to accept whatever payment was offered them in lieu of wages. Three centuries of colonialism and exploitation had eroded their capacity for resistance and nullified their expectations. The Indian had learned to behave submissively, something also observed by Isaiah Bowman.

In Ecuador Ross encountered Indian peasants degraded to the condition of “beasts of burden.” They differed little from draft animals, both in their workloads and in their passive endurance of pain.

Slavery and ill treatment have sunk the native population into the depths of degradation and hopelessness. Perhaps nowhere on the globe do human beings so much resemble passive beasts of burden. In fact, the Indians used to be designated in documents as “smaller beast of burden” to distinguish them from pack-animals. Loaded, they clamber up the steep streets as stolid as little gray burros. One sees many an urchin of seven years bearing on his back a load of bricks as heavy as he is. . . . Here is a file of barefoot women bent under loads of earth or bricks, escorted by a man with a whip! (ibid., 24–25, emphasis added)

However archetypical, the image of an Indian bent by a huge load on his or her back marks the presence of a historical process; a centuries-old system of exploitation had reduced indigenous peoples to an infrahuman condition.
Ross described the Mapuches of southern Chile as people living in quite primitive conditions, given to theft, and naturally indolent. He considered the “pure Mapuche” a vanishing race. Famous for their resistance to colonialism, they had been decimated by alcoholism, disease, and miscegenation. Their influence on the common mestizo laborer of Chile had been negative. Ross blamed the “Mapuche blood” for the alcoholism that kept the working classes in perpetual poverty, for the excessive sexual appetite of lower-class males, for the spread of prostitution and venereal disease in the mining districts, and for the repeated pilfering of Chilean custom houses (ibid., 220–24). He noted also that Mapuche lands were now occupied by enterprising German farmers and British missionaries.\(^\text{12}\)

But his mourning for the vanishing race was overshadowed by his optimistic comparisons of Chile with U.S. western expansion in the previous century. In southern Chile, as in the U.S. Midwest, European immigrants had settled after the displacement of Indian tribes, giving rise to egalitarian and industrious rural communities. Thus, the old “dark and bloody ground” of the continent—Araucania—was gradually turning into a “rough frontier of democracy,” just like Montana and Wyoming after the suppression of the Sioux (ibid., 101–2). For Ross, whitening stood here for civilization, free labor, and individual initiative. Ross repeats an anecdote from a German rancher, mocking the innocence of Mapuches for selling their lands in exchange for liquor, in order to inform the reader that Mapuches’ degeneration and demise were preordained and inevitable.

**LANDLORDISM AND LABOR SERVITUDE**

In all western South America Ross found no traces of an independent farmer class (ibid., 139–41). In the Cauca Valley, in the Ecuadorian sierra, and in the highlands of Peru and Bolivia, he instead encountered large estates under the control of absentee landowners.\(^\text{13}\) He attributed this situation to Spaniards’ residential habits since colonial times. Finding no appropriate social life in the countryside, Spaniards preferred to reside in urban areas, managing their estates through mestizo superintendents or **mayordomos**. By exploiting the semi-servile peasant-laborers, absentee landlords accumulated rents that enabled them to live in the cities with style. As a result of this, the countryside showed few agricultural improvements and also few social interactions.

In addition to absentee ownership, Ross found debt peonage to be a pervasive feature of social relations in Andean nations. He first discovered it in Colombia. In the Pasto region, peons worked for five to ten cents per day in exchange for the use of a plot of land. “Of course, such pitiful earnings do not suffice for the
needs of his family, so he is obliged to run into debt to his ‘amo’ or master for money and supplies,” Ross wrote (ibid., 149). He encountered similar conditions in Ecuador, Bolivia, Peru, and Chile. In Ecuador there were traces of corvée labor: agricultural laborers worked four days a week for the landowner, receiving only twenty to forty cents. Having to purchase all their supplies from the landowner, they remained trapped in debt. In Bolivia, the pongo laborer worked for the landlord three to four days a week without pay, receiving only coca leaves, aguardiente (alcohol), and food. Landowners maintained work discipline with whips (ibid., 157).

In the Peruvian highlands Indian peasants earned fifty cents a month tending alpacas, llamas, and sheep, having to purchase from landlords their provisions of wheat, maize, and coca leaves. In addition, peasants had to pay a tribute in kind to the landlord: a quintal of alpaca wool, one sheep, plus the labor required during sheep-shearing (ibid., 150–52). In central Chile the inquilinos were wholly dependent on landlords. They were allowed to plow two to six acres of the landlord’s land for their own crops; in exchange, they had to work three hundred days a year for ten to eighteen cents a day. With such low wages, the inquilinos had no hope of acquiring land (ibid., 158–59).

Andean peasants were a dependent, servile class. Low agricultural wages and debt peonage were part of an exploitative system with roots in the colonial era. Large estates, absentee proprietors, and semi-servile Indian peasants had all been features of Spanish land and labor policies since the sixteenth century. Customary practices, such as tribute and corvée labor, had pushed the price of labor below subsistence level. Low wages forced peasants to ask their landlords for credit until, trapped into unpayable debts, they were unable to abandon the estate.

Corvée labor and debt peonage turned the rural districts of west coast South America into “feudal” lands. That is, the contemporary situation of peasants and laborers reminded Ross not only of sixteenth-century Spain, but of conditions in Europe in the Middle Ages. Visiting the Andean countryside was like traveling to the European past. Johannes Fabian (1983) calls this type of confusion between space and time the “refusal of coevalness.” At one point, Ross reached even further back than the Middle Ages: under Spanish colonialism, he said, agriculture had regressed to a biblical past. The Ecuadorian peasants that Ross encountered were threshing wheat in the same way as Egyptian peasants did in the time of the pharaohs (Edward A. Ross 1915, 21–22).

Spanish colonialism had left a spatially differentiated pattern of “servility.” As the visitor traveled from north to south along the Andes, the degree of “feudality” declined: “Broadly speaking, light and freedom wax as you go south from
Panama” (ibid., 148). At the end of the journey was Argentina, a country where the agricultural laborer was completely free. Looking at Argentina’s contractual labor arrangements, the relatively high standard of living of its workers, and the general prosperity of the population, Ross concluded that here was the only country in South America that had shaken off the legacy of colonialism (ibid., 134).

Ross pointed to two historical moments as the origin of landlordism and servile labor: the early colonial period and the post-independence assertion of national sovereignty. In the sixteenth century ruthless conquistadors had distributed among themselves large tracts of land and the labor and tribute of indigenous peoples. In Peru the colonizers had gone even further, destroying the Inca irrigation system and thereby damaging the livelihood of many Indian communities. The “mita,” a system of coerced labor in the Potosi mining complex in colonial Upper Peru, greatly reduced the number of cultivators, leading to the shrinking of tillage (ibid., 47). In the post-independence period national states pushed back the Indian frontier, while rapacious land-seekers robbed indigenous peoples of their lands.

Ross’s sympathy clearly lay with the colonized Indian. Life was hard in the Bolivian highlands. At fourteen thousand feet, peasants had to endure extremely cold temperatures without fuel, living almost in isolation. Dire poverty rendered Bolivian peasants unable to understand American notions of material comfort.

Surely it is a cheerless existence that the Indians lead on this lofty tableland. Home is a thatched adobe hut in the corner of a farmyard fenced with sod or loose stones, in which are folded at night the merinos and the llamas. Lonely and insignificant, the little hut stands in the vast cloud-shadowed, wind-swept spaces. No trees, no shrubbery or flowers, no birds, no color, no roads, no neighbors or town to visit—nothing but the dreary moor, the lowering clouds and the moan of the chill wind. . . . Never once in their lives have these people been comfortably warm, nor do they even know that there is warmth in the world. (ibid., 62)

In the central valley of Chile living conditions were less severe. Here, the beauty of the cultivated landscape projected the image of abundance: green wheat fields, exuberant alfalfa patches, and luxuriant vineyards. Yet one detail of the panorama startled the U.S. American observer: there were no substantial dwellings. “From end to end of this agricultural paradise one never sees what we would call ‘a good farm residence.’” Again, instead of investing in
estate houses, the rents from the fields went to sustain luxurious houses in provincial capitals or in Santiago (ibid., 100).

In many regards, Argentina was the exception. Here was a country projecting hope, in which welfare was rising, not only for the landowners but also for tenants and agricultural laborers. Laborers could become tenants; tenants in turn could acquire some land. The welfare of urban workers was rapidly improving. The possibility of social ascent was quite visible: Ross observed that workers at Buenos Aires were moving into the suburbs, taking advantage of installment plans and relatively high wages. In a few years, an immigrant worker could aspire to build a modest house. True, Argentina was also marked by the problem of latifundia. Yet the “peon class” was improving its condition, under the favorable influence of common schools, military service, and sanitary campaigns.

**DEMOCRATIC SOCIABILITY**

Nothing concerned the Wisconsin sociologist more than the way South American societies were structured. He knew that manners, customs, and common understandings—sociability—kept societies together. In countries where colonial dynamics persisted, he found traces of colonial sociability: aristocratic mentality, dismissive treatment of servants, no sense of social equality, and unwillingness to cooperate. Conversely, in modernizing societies, people had a “democratic sensibility,” a sense of personal worth that affirmed social equality (ibid., 208–9). In particular, Ross was interested in evaluating the degree of democratic sociability that different countries had achieved. To do so, he looked for the presence or absence of certain U.S. institutions: a public opinion mobilized by a competitive free press, youths trained in the discursive practices of a democratic society, men organized around common purposes, and universities that trained young men in high ideals. In all these dimensions he found that South America still lagged far behind the United States.

South American elites, in particular, failed Ross’s test of democratic sociability. Though modern in appearance, they remained aristocratic in spirit. Their attitudes and behavior betrayed their embrace of an aristocratic type of modernity. Foreigners were often impressed by the affection South American men showed to family members and friends. But this affection was restricted to the inner circle of relatives and friends; it did not extend to the community as a whole. Generous within the family, South Americans were egotistical in the social terrain. They did not bequeath their personal fortunes to hospitals or educational institutions. They let the church administer most charities. Each looked after his own welfare and failed to cooperate for the common good.
Disinterested help was not easily extended to strangers. Although Argentine gauchos were famously generous, U.S. machine experts were unable to procure drinking water from them (ibid., 212).

In the United States multiple associations and institutions had contributed to create a “cooperative feeling.” In South America, race, class, family life, and ill-conceived educational institutions conspired to prevent this development. Ross found the South American family to be disorganized and unable to transmit “character” to boys and girls. The avoidance of marriage favored impermanent relations between men and women. As a result, many children grew up without a father figure. South American men were unable to cooperate, chiefly because of their inherited sense of pride. Their associations, whether a literary club or a political party, tended to fall apart due to internal disputes, driven by jealousy, distrust, or sheer intolerance. Local political parties were unlike those of the United States. Groups of men followed a caudillo in order to appropriate the spoils of government. To the South American, politics was a competition for state jobs and kickbacks. Their “predatory politics” limited the prospects of building democratic sociability.

South America’s lack of democratic sociability was rooted in premodern social relations. The great landed estates, labor servitude, and elites’ infatuation with urban life prevented the formation of a rural middle class, the true foundation of U.S. democracy (ibid., 144). Having vacated the countryside, the elites had robbed South America of its only chance to replicate U.S. political development (ibid., 141). The two exceptions to this rule—southern Chile and littoral Argentina—tended to confirm this socially grounded theory of democracy. In southern Chile, German landlords had displaced Mapuche occupants and were teaching Chilean farmers industriousness and perseverance. In Argentina the impact of mass European immigration had created the conditions for moral uplift in towns and countryside.

A sociologist needed to distinguish between two types of sensibilities: the politeness of equality and the politeness of hierarchy. Peru showed upper-class politeness, but not democratic manners. Argentina, by contrast, presented a greater sense of social equality and cooperation. Again, only in Argentina did Ross find a society that had laid the groundwork for building a modern sociability. He found the Argentine elite “open-minded” and unafraid of change. To them, progress was not only material prosperity, but also the adoption of new institutions and new forms of associative life. Argentines were, in this regard, the only “postcolonial” elite in South America. For they had actually rejected the foundations of the old colonial order: disdain for labor, contempt for business, personal pride, social exclusiveness, clericalism, and patriarchal customs.
Its policy of lay education, its democratic school system, its reliance upon the woman elementary teacher, its cultivation of athletic sports, its boy scouts, its public libraries, its bacteriological laboratories, its experiment stations, its boards of health, its National Department of Agriculture, which spends half as much as the United States Department of Agriculture—all these innovations witness to the willingness of Argentina to risk change of soul. (ibid., 136–37)

Ross’s high expectations for Argentina’s future were shared by many eminent foreign visitors during this time. These expectations led Ross to pronounce that Argentina would converge toward U.S. modernity in the future. “The Argentines are the one South American people likely to have enough in common with us to found a genuine friendship. Our people ought to feel a sisterly sympathy with this new motley people, engaged in subduing the wilderness and making it the seat of civilization” (ibid., 137–38).

In contrast to Leo S. Rowe, who argued that any intellectual or elite member in South America could be a good friend, Ross was sure that it was similarity in culture that made for good neighbors. This situation suggested that the United States should take a different policy approach with Argentina than it did with other Latin American countries. Convergent paths of progress and democracy enabled a sympathetic understanding between the two countries, running in both directions. “Americans” should show sympathy to the Argentines and understand some of their shortcuts and detours in the road to progress and civility. Argentines, in turn, should study U.S. history in order to learn about how their northern neighbor had handled similar problems in the past (ibid., 138). This is the only moment in which the U.S. sociologist presents the possibility of a two-directional exchange between the United States and a South American republic.

The expectation of sociopolitical convergence and inter-American friendship was clearly grounded on race: the fact that Argentina was the whitest country in the region. The overwhelming presence of European immigrants made intelligible Argentina’s institutional development, public sociability, even its moments of agrarian protest. In the Southern Cone, due to the magic of whiteness, the “South American character” could engender a democratic society. In Andean South America, by contrast, social relations remained “feudal,” a type of backwardness not easy to undo.

Ross devoted a whole chapter to the role of women in the region (ibid., chap. 7). As a progressive, Ross expected to see progress like that made by women in the United States. He was disappointed. He found South American
societies incorrigibly male-dominated and patriarchal. Divided spheres dominated norms in sexuality, family relations, and the law. Women lived in the domestic, familial sphere, while men controlled most of the space devoted to public life. And he found South American males to be sexual predators. In the street and the house, all women were fair game; incest and rape abounded in the southern republics.

Coloniality and the South American Character

On the bases of miscegenation, colonial land policies, and the persistence of servile labor, the U.S. sociologist was able to assemble the typical “South American character.” The social and political man of the region—the Andean South American in particular—revealed four major deficiencies in character: indolence, want of persistence, mutual distrust, and excess of pride.

The reluctance to exert physical effort was an important failure of the South American character. A person of high status would never carry his own luggage or work alongside his employees. South American elites enjoyed being served; the number of servants constituted a marker of relative social standing. Though characteristic of elites, this trait pervaded the whole society. Because of mutual distrust and excessive pride, the “South American” was unable to cooperate. Clubs and associations wasted energy in internal disputes and personal antagonism. Too sensitive to criticism, the South American scholar did not return to seminars or groups where he had been criticized. Good at starting a project, elite men were unable to carry it to completion. Universities in the region lacked the basic facilities and institutions that made young men in the United States cooperate. They had no athletic club, no gymnasium, no tennis court, no debating society, and no poetry recitation sessions on campus. Students did not interact much with their professors or with other students. This precluded the cultivation of the “collegiate spirit.”

As a progressive, Ross assumed that educated men were responsible for making societies and governments. In Latin America colonialism had created an enormous social distance between elites and masses, yet elite men had failed to establish themselves as models worthy of imitation, and it was now clear why. Elite men (the scientist, the functionary, the literati, the professional) displayed aristocratic sensibilities, showed disdain for manual labor, and rejected social equality. Their institutions and way of life, while modern and European in appearance, betrayed the influence of centuries of Spanish rule. Consequently, educated elites would not effect the institutional reforms demanded by a democratic society: a professional bureaucracy, equal opportunities for
women, an honest and disinterested press, the regulation of monopolies, modern labor laws, and municipal reform.

The author projected images of progressive “America” on the lands south of Panama and found them lacking. All the traits of coloniality marked a lack of sociopolitical modernity relative to the U.S. model of government in the Progressive Era, not relative to models of popular sovereignty from the French Revolution or from British constitutional government. It was in relation to this ideal that the elites and the masses of the southern republics appeared lacking in character and seemed incapable of building democratic sociability.

Here, we confront a double subalternity. The failings of the Indian and mestizo subalterns were, in the last instance, the responsibility of South American elites, men who had shown themselves unable to teach virtue and civility to the masses. In fact, we are full circle back into the “American model.”

Many of the faults of contemporary South American character can easily be duplicated in the history of our own people. To-day we succeed in making certain virtues fairly general among ourselves because gradually our society has equipped itself with the home training, the education, the religion, the ideals of life, the standards of conduct, and the public opinion competent to produce these virtues. Societies that lack the right soul molds will of course fail to obtain those virtues. But there is no reason why they may not borrow such molds from the more experienced societies, just as we ourselves have sometimes done. (Edward A. Ross 1915, 249–50; emphasis added)

This is an interesting twist to the idea of empire. The benevolent empire needs to conduct its civilizing mission by example. Like a blueprint ready for reproduction, it must export its standards of conduct, its social and cultural institutions, its religious and educational values, its instruments for shaping public opinion, and its architecture of local government. In other words, the United States needed to become a teacher to the South American republics.

Key features of South American sociability—the aristocratic mentality, the subsistence of feudal obligations, and the lack of cooperative spirit—were attributed to the persistence of colonial heritage. The racial miscegenation prevailing in the subcontinent was directly associated with the permissive Spanish policies regarding marriage and reproduction. Similarly, colonial land policies generated a land-owning class with aristocratic pretentions. Transplanted “feudal” relations had persisted in the twentieth century under the form of debt peonage and corvée labor. More important, Spanish absolutism had prevented the development of self-government in the colonies. To overcome coloniality,
Ross suggested institutional and social reform that presupposed a modern way of life, characteristic of the United States. The transplantation of the U.S. progressive agenda informed the failings of the “South American character.” The “race factor” complemented this view, facilitating or hindering social democratic change.

Between Medieval China and Modern Social Revolutions

When the sociologist turns world traveler, he becomes a comparativist. Observations made in one region serve as models for inquiries in other regions. Ross’s visit to China in 1910 served to confirm his prior conceptions about the influence of race on socioeconomic and political development. In addition, China presented him with a vision of a remote past that later helped him interpret South American societies. Ross considered Chinese cities to be contemporary remnants of medieval Europe: “China is the European Middle Ages made visible,” he wrote (Edward A. Ross 1911b, 721). Walled cities, people littering the streets, confusion in traffic, no sanitary provisions, and crowds struggling to survive struck him as utterly “medieval.” Ross associated “medievalism” with the lack of concern for public spaces and for the common good. Living in the past, in a condition close to subsistence, the Chinese could not fathom modern ideas of public welfare and democratic interaction (ibid.).

Ross inflected the sociological portraits of Andean South America with the image of medievalism, a term that came straight from his book on China. The same could be said in connection with sociability. The “medieval cities” of China produced societies in which clan, family, and private interest dominated over the public good. The enterprising Chinese polluted the cities, deforested the woods, and contributed nothing to the upkeep of public roads. The societies south of Panama were in this regard similar to Chinese cities, lacking any notion of the public good. Yet South of Panama (1915) constituted a watershed in Ross’s conceptions of the social, due to the interaction of race and colonialism. Ross presented an empathetic, though condescending, view of Aymaras and Kechuas, indigenous peoples defeated by the force of three hundred years of colonialism.

Similarly, Ross’s “discovery” of land concentration and labor servitude in South America proved a lightning rod for future observations in Mexico and Russia. Three years after his return from Buenos Aires, Ross spent a semester in revolutionary Russia (July–December 1917), where he examined the social changes and conflicts that led to the October Revolution. Ross visited Mexico in 1922, after the revolution had come to a halt and agrarian reform was in

Chapter 8

204
progress. *South of Panama*—it is my contention—served as a crucial point of reference for examining these two all-important revolutions of the twentieth century.

In *Russia in Upheaval* (1918), Ross attempted to explain the roots of the revolution. The sociologist underscored the oppression of workers and peasants under the tsar, and the unbounded cruelty and violence of the police. He compared the tsar’s police violence to the cruelty of Spaniards during the Conquest. The Russian peasantry had been kept in a situation of poverty, ignorance, and superstition for three hundred years. The revolution had fostered great expectations. The Bolsheviks were able to impose order by creating a workers’ army. Ross admired the organization of Russian workers and praised the land policies of the Soviets.\(^{21}\)

Similarly, in *The Social Revolution in Mexico* (1923), Ross applauded the efforts of the Mexican revolutionary government to restitute land to Indian communities. Yet he condemned the “Indianization” produced by the revolution. After the fall of the Díaz regime, white and mestizo elites took control of government, and in the countryside the revolution empowered the Indian masses to an extent previously unimaginable. As a result, the previous “color line” (white-Indian) was rapidly blurring.\(^{22}\) Mexican peasants were people without future, less alert and with less mental edge than the “bucolic Chinese.” Ross also compared the innate racial inferiority of Mexicans with that of U.S. blacks, bringing to the discussion “evidence” of the inferior IQs of Mexican children in schools of the U.S. Southwest.

### South America within the Textbook

In 1923 Ross published *The Outlines of Sociology*, a textbook intended for college undergraduates.\(^{23}\) In this book knowledge he had gained through extensive foreign travel (in China, Russia, South America, Mexico, and Japan) appears as supporting evidence of universal sociological principles. Impressions are transformed into “facts,” and facts are accommodated into the procrustean bed of “social theory.” This textbook constitutes an important landmark in U.S. strategies for understanding South America. Reading this book, sociology students could see “South America” as an exemplar region of failed paths of social organization and political culture.

To homogenize South America, Ross compressed distinct temporalities into three categories: “ancient,” “modern,” and “advanced.” To explain the persistence of colonial institutions and social practices in contemporary South America, he referred to historical works about the European Middle Ages.
Thirteenth-century Europe illuminated the reading of a process extending from the sixteenth century to the eighteenth—Spanish colonialism—that in turn served to explain contemporary social-racial inequalities and aristocratic government. Spanish America appears as the realm of a transplanted feudality, a subcontinent locked in a double temporality, combining the European Middle Ages and twentieth-century Euro-American modernity.

The term “South America” works generally as a negativity that confirms the reader’s presumptions about progress, civilization, democratic sociability, and race adaptation. Specific South American examples serve to validate notions of social domination, class government, clericalism, and social control. Chile appears at least three times in the book: as an example of government corruption; as a place where “hacendados” constitute the “governing class”; and as a country where elites expressed disdain for manual labor (Edward A. Ross 1923a, 101, 189, 250, respectively). Peru is mentioned as a place where Indian peasants are “hooked” into debt peonage by unscrupulous labor contractors (111), and as a country of enduring traditions, where servants accompany local ladies to church to protect familial honor (250, 253). Colombians are noted by their “politeness” (174). Bolivia and Ecuador evoke images of exploited and drunken Indians, living in fear of white men (41, 113). Argentina, a country praised for its successful immigration policies, appears also as a land of great landed estates (239).

These cases functioned for Ross as examples of general theories about social organization. The factual content of the information is the same as in his earlier work, but he reaches a greater level of generalization. South America was to Ross a “land of exploitation,” a territory where the conquistadors’ unmatched cruelty and heartless exploitation still persisted. Masses of landless peasants and laborers lived in complete dependence on great landowners and subordinated to their will. The ubiquitous presence of “debt peonage” had prevented the emergence of “free labor” in agriculture, a key sign of social modernity. In addition, the region suffered from the lack of religious plurality and limited political participation.

This was the “South America” that transpired from Ross’s sociological tracts. The elites dominated the sphere of politics, keeping the masses ignorant and uninformed (ibid., 218–19). Deprived of education, the masses could not aspire to positions of public responsibility or get their grievances heard by government. The “governing class” monopolized state revenues and employment, maintaining the control of elections through fraud and intimidation. Excessive pride made South Americans politicians unwilling to reach compromises with political adversaries. To resolve political disputes, elites often resorted
to violence.\textsuperscript{28} South American societies remained segmented into strata and factions as in colonial times. Instead of following common values and norms, each ethnic component adhered to its own standards of conduct.\textsuperscript{29} Hence, there was no cross-class civilizing influence and no common social purpose. The region’s vast experiment in race-crossing had not facilitated the social bonding required to build a democratic and industrial society.

These faults of the “South American character” became integral to the lessons imparted to sociology students. The student who completed Ross’s sociology class learned that South America was a land of elite-controlled government, widespread corruption, great inequalities in wealth, debt peonage, aristocratic sensibilities, and premodern social interactions. Andean South America, in particular, represented the opposite of U.S. economic, social, and political modernity. The U.S. Midwest and the industrialized Northeast embodied all the features that South America had failed to attain: a strong rural middle class, an egalitarian ethos, and a free and skilled workforce.

In the history of land policies the U.S. sociologist encountered a fundamental difference between the two Americas: the existence in the United States, but not in South America, of a farming middle class. Though presenting an excess of “commercialism,” the United States stood as an advanced capitalist society that had successfully experimented with constitutional popular government (ibid., 455). There was internal division, however: the backward U.S. South was the site of aristocratic pretension, economic backwardness, and racism, and to this extent, resembled Andean South America. The planter class of both societies exhibited the same refinement of conversation and manners, the same disdain for manual labor, and a similar degree of male domination in the household (ibid., 89, 250, 256). The Chinese, the Russian, the Mexican, the Hindu, the Portuguese in Africa, and the South American all now formed part of Ross’s stylized theory about the functioning of society, in which modernity and tradition were arranged in time and space. “South America” fed a system of comparative sociology. The Incas appear as a civilizing empire comparable with other ancient empires, such as the Gauls and the Romans (ibid., 177). Chilean landlords’ control of politics was assimilated to that of Junkers in Prussia and to the eighteenth-century English gentry (ibid., 189). When Ross blamed the ignorance of the masses for the low life expectancy in the less-developed world, he provided as examples Brazil, Ceylon, and Cuba (ibid., 9).

In \textit{The Outlines of Sociology} we see the emergence of an internationally comparative or transnational sociology, a comparative sociology of cultures grounded in fairly homogeneous geocultural regions. Propositions about organization, professionalism, schooling, class exploitation, and so on are presented as
universal because they are supported by evidence from different world regions. Long before area studies consolidated itself in the U.S. academy, Ross talked of the Far East, the “Mohammedan world,” Russia, and China as world regions, each with peculiar but comparable institutions, social organization, and customs.

At the end of the book, Ross deals with social “balances” and “excesses” (ibid., 461). Societies lacking social balance presented excesses labeled “militarism,” “clericalism,” “commercialism,” and “the rule of the death.” Each of these social maladies was associated with the excessive influence of a different social actor: the military, the clergy, businessmen, and ancestors. China was typical of societies where excessive respect for tradition and ancestor worship prevented the development of new ideas. Mexico, Peru, and Colombia presented examples of “clericalism,” places where the Catholic Church had given society its moral imprint. The United States suffered from “commercialism,” a social imbalance due to the exaggerated influence of big business.

From this textbook U.S. college students learned what Ross had argued in his more scholarly texts: that South America was a land of exploitation and servile labor, where the Catholic Church had excessive influence on the populace and dominant elites had little concern for the poor. These negative features were associated with the colonial heritage. A great social, economic, and cultural distance separating the haves from the have-nots made it difficult to envision the introduction of democratic sociability. Two systems of comparison were at work in this textbook: hemispheric, contrasting Andean South America to the most advanced aspects of the United States; and transnational, naming South America as another world region, comparable to Russia, China, Muslim nations, the Far East, Africa, and Oceania.

Conclusion

I have shown the importance of Ross’s “sociological portrait” of South America to his discovery of a land-labor problematic associated with coloniality. South of Panama (1915) underscores the long-term impact of Spanish colonialism on Andean societies. At first glance, the book appears as a racial heterology, the forced imposition of a racial viewpoint on quite diverse societies and cultures. Yet a closer reading produces a quite different impression. South of Panama is perhaps the first devastating criticism of landlord domination and exploitation of indigenous peoples written by a U.S. sociologist. At the beginning of the First World War, Ross “discovered” that South America still carried the imprint of its colonial heritage. The west coast countries, in particular, were still trapped into the evils of landlordism, elitist government, widespread corruption, state-
sponsored religion, and the exploitation of indigenous peoples. There was little chance that these republics would join the rank of modern civilized nations in the near future.

Ross projected onto his social panoramas of South America a full-fledged progressive agenda. He brought into the discussion about the societies south of Panama questions of public opinion, university culture, and democratic sociability that were at the very core of progressive ideology. Yet his progressive impulses clashed against a wall of medievalism, and he could not integrate the two visions (progressive America and premodern Andean South America). In the end his solution consisted in allocating countries into two separate groups: the progressive and the nonprogressive.

Ross's sociological panoramas divided the region into two types of societies. Modern democratic sociability was more likely to emerge in places such as southern Chile or the Argentine littoral, where the presence of European immigrants, widespread education, and associative life created favorable conditions for the development of a democratic society. In most of Andean South America, by contrast, Spanish colonial institutions preempted the possibility of following the path of U.S. progress. As a consequence, Andean America was unable to acquire and enjoy the blessings of U.S. modernity: industry, democracy, and science. While at first, Ross had tried to look at South America through the lens of racial difference, in the end it was the colonial heritage that he blamed for the premodern condition of Andean America.

The work of Edward A. Ross followed in scope the passage of the United States from isolated nation to Caribbean empire to hemispheric hegemon. His later writings, to an extent, betrayed sociology's ambition for universal scope. Just as the United States imagined itself, during the Wilson years and beyond, poised to become a powerful actor on the world scene, Ross's sociology went from parochial to international. His early works on social control and immigration were informed by the “American” national experience. In contrast, his book *The Outlines of Sociology* was supported by a system of references relating to the world at large. Firsthand observations in Asia, South America, Russia, Central Europe, and Africa enabled the Wisconsin sociologist to gain a comprehensible view of “world trends” that allowed wide-ranging international comparativity.

Ross's exposure to foreign nations and cultures helped him envision a transnational scholarship. His “sociological portraits” of China, South America, Mexico, and Russia contained the foundations of a “worldly sociology,” a comparative ethnography of regional cultures and sociopolitical organizations. This was a sociology that sought to find regularities of international validity. This “worldly
sociology” was an antecedent to the fragmentation of the world into “areas of study,” an approach that consolidated and prospered during the Cold War period.

Many of Ross’s observations about South American societies were inflected by the forces of race, landlordism, and the lack of democratic sociability. Ross’s great “discovery” was to confirm that many of these features remained dominant in the second decade of the twentieth century—except in Mexico and Argentina. In Mexico a social revolution put an end to Spanish medievalism; Argentina had done the same through mass European immigration. Nowhere in his works did Ross deal with the Circum-Caribbean, where the United States set up temporary colonial administrations.32

After Ross, U.S. sociology became an abstract and highly structured science of society, whose principles were purportedly universal in scope and validity. Under Robert K. Merton and C. Wright Mills, the science distanced itself from its earlier dependence on “sociological portraits” of regions, silencing in this way all traces of its own imperiality. In 1947 the sociologist W. Rex Crawford argued for universalizing the discipline: sociology should be a science for understanding world societies, not just a set of principles applicable to the United States. If U.S. sociology was to reclaim its role in the making of a more peaceful world under U.S. guidance, it was necessary to return to the understanding of “cultural areas,” as Ross had done. Crawford called attention to the fact that sociology majors were graduating without any knowledge of Latin America. The discipline’s neglect of the region was also noticeable in books on rural sociology, population and family studies, criminology, and social problems. Crawford (1948) called sociologists to rediscover the lost interest in regional specificity to better promote sociology as a transnational science in the service of international relations.