

THE HISTORY OF THE FAMILY  
IN LATIN AMERICA:  
A Critique of Recent Work

*Elizabeth Anne Kuznesof*  
*University of Kansas*

- NOTABLE FAMILY NETWORKS IN LATIN AMERICA.* By DIANA BALMORI, STUART F. VOSS, and MILES WORTMAN. (Chicago: University of Chicago Press, 1984. Pp. 290. \$27.00.)
- THE PRADOS OF SÃO PAULO, BRAZIL: AN ELITE FAMILY AND SOCIAL CHANGE, 1840–1930.* By DARRELL E. LEVI. (Athens: University of Georgia Press, 1987. Pp. 284. \$32.00.)
- POLITICS AND PARENTELA IN PARAIBA: A CASE STUDY OF FAMILY-BASED OLIGARCHY IN BRAZIL.* By LINDA LEWIN. (Princeton, N.J.: Princeton University Press, 1987. Pp. 497. \$40.00.)
- A MEXICAN ELITE FAMILY, 1820–1980: KINSHIP, CLASS, AND CULTURE.* By LARISSA ADLER LOMNITZ and MARISOL PEREZ-LIZAUER. (Princeton, N.J.: Princeton University Press, 1987. Pp. 294. \$45.00 cloth, \$15.00 paper.)
- THE MONTERREY ELITE AND THE MEXICAN STATE, 1880–1940.* By ALEX M. SARAGOZA. (Austin: University of Texas Press, 1988, Pp. 209. \$30.00.)
- KINSHIP IDEOLOGY AND PRACTICE IN LATIN AMERICA.* Edited by RAYMOND T. SMITH. (Chapel Hill: University of North Carolina Press, 1984. Pp. 341. \$29.95.)
- KINSHIP, BUSINESS, AND POLITICS: THE MARTINEZ DEL RIO FAMILY IN MEXICO, 1823–1867.* By DAVID W. WALKER. (Austin: University of Texas Press, 1986. Pp. 278. \$27.50.)

In discussing the “encompassing” nature of social history in 1971, Eric Hobsbawm suggested that “historians pick on one particular . . . relational complex as central and specific to the society . . . in question, and group the rest of the treatment around it” (p. 31). In 1985 the late Robert Oppenheimer and I proposed the family as that “central complex of relationships through which political, entrepreneurial, and agrarian history may be viewed to make societal sense out of seemingly impersonal phenomena” (p. 220). The seven books being reviewed here provide substantial illustration of that important point: the heuristic significance of the family as an index to understanding more general

questions of historical interest. In many cases, the subject under investigation in a family history is not so much the family itself but rather the ways in which the family reflects, refracts, and interfaces the Latin American political economy and the ideals, values, and strategies of Latin American society.

Two of the seven books under review were written mostly by anthropologists; historians authored the other five. All but one of the books concern elite families and their relationships to society. The books by Lomnitz and Pérez-Lizaur, Smith, and Levi all focus on the meanings and uses of kinship. Balmori, Voss, and Wortman's study concerns the predominance of notable family networks in the political and economic arenas of Latin America and the strategies utilized by families to attain notability. Saragoza's study of Monterrey, Mexico, and Lewin's of Paraíba, Brazil, analyze the political and economic relationship of regional family networks to the state. Finally, Walker analyzes the Mexican political economy in the first half of the nineteenth century through the pragmatic lens of an entrepreneurial family in search of business opportunities.

Several common concerns are addressed or suggested by these volumes: the solidary mechanisms of families and their benefits for individuals; the function of gender in family organizations; the relationship of family notability and family strategies (such as endogamous or exogamous marriage patterns) to mode of production and formal political structures; the significance of native capital and entrepreneurship to the economic development of Latin America; the relationship of elite family empires in both their political and economic dimensions to the development of national political structures; and the relationships of the rise of individualism and of class society to elite family solidarity and power in Latin American society. A number of other themes suggest themselves—especially those concerning race and ethnicity. Unfortunately, however, space limitations force a substantial concentration on themes shared by several volumes.

The collection of essays entitled *Kinship Ideology and Practice in Latin America* focuses on questions of meaning, values, and ideology, utilizing kinship and family studies as the empirical base. The eleven essays—which range geographically from New Mexico to Mexico, the Caribbean, Peru, and Brazil—analyze diverse themes that include kinship among slaves, sexuality, inheritance, motherhood, foster parenthood, and elite families. Although kinship has long been viewed as important in understanding the family (especially by anthropologists but less obviously by historians and other social scientists), there has been a tendency to refer to kinship as a residual category that explains otherwise incomprehensible patterns of behavior. The editor of this collection, Raymond Smith, points out that kinship has been “nothing but

the recognition of the 'real' facts of consanguinity and affinity" (p. 19). Smith argued in 1978 that "the first task is the careful study of . . . systems of meanings . . . which surround the domain of social life which our European common-sense categories label 'kinship.'"<sup>1</sup> In the book under review, Smith suggests that "more attention should be paid to the particularity of the historically generated cultural forms characteristic of this area, and to the social practices through which those forms operate in the specific conditions of contemporary society" (p. 4). The "forms" mentioned refer to "collective representations" deeply imbedded in the thought processes of individuals, which together present a cultural image of those immediate social relations that count as kinship.

All but two of the essays in *Kinship Ideology and Practice* concern the lower-class or slave populations of Latin America. The insightful essay by Stephen Gudeman and Stuart Schwartz entitled "Godparenthood and Slaves in Eighteenth-Century Bahia" provides a new perspective on the slave's view of his or her position in society and possible relationships within that context. B. W. Higman expands knowledge of relationship terminologies utilized by slaves in Caribbean society. Enrique Mayer provides a close reading of testimony by a sixteenth-century Andean peasant concerning his domestic economy, while Juan Osio analyzes the "intrinsically optional" *compadazgo* system in Andean society. Jack Alexander discusses the interrelationship of love, race, slavery, and sexuality in Jamaican images of the family, suggesting that the family provides a mode of legitimation for the families of Jamaican freedmen.

Ruth Cardoso briefly looks at the purposes and significance of fostering children in Brazilian shantytowns. Guillermo de la Peña analyzes "kinship ideology" as it contrasts with "kinship organization" or norms in twentieth-century Jalisco, Mexico. Larissa Lomnitz and Marisol Pérez-Lizaur present an essay on the solidarity of the three-generation Mexican "grand-family." Ramón Gutiérrez discusses sexuality and marriage in a fascinating essay on colonial New Mexico. A perceptive and strongly argued article on gender relations and family labor on São Paulo coffee plantations is contributed by Verena Stolcke (Martínez-Alier). Finally, Fiona Wilson argues that inheritance practices (unlike inheritance law) in nineteenth-century Peru demonstrate the subsidiary position of women in that society. In general, *Kinship Ideology and Practice in Latin America* offers a strong and interesting group of essays, especially those by Gudeman and Schwartz, Gutiérrez, Stolcke, and Wilson.

*Notable Family Networks* focuses more specifically on associations of families in late-eighteenth- and nineteenth-century Latin America who used "family amalgamation to attain notability" (p. 2). Authors

Diana Balmori, Stuart Voss, and Miles Wortman explain that “because of the relative vacuum of sociopolitical structures in the nineteenth century and through their own creative adaptations to it, they created a network that functioned as a social organization in its own right” (p. 4). The major thrust of the book is that “these notable families may be the pivot around which Latin American history moved from the late colonial period through the early twentieth century” (p. 4). The thesis of the dominance of family networks is argued by presenting case studies on Central America, Northwest Mexico, and Buenos Aires indicating the interconnectedness of elite groups that dominated nineteenth-century politics and economic activities. A subtheme deals with the continuousness of notability—through three or four generations—and the characteristic strategies and approaches of each generation.

This kind of analysis of family patterns originally appeared in a 1979 article coauthored by Diana Balmori and Robert Oppenheimer.<sup>2</sup> Based on a comparative study of broad collective biographies of notable families in Argentina and Chile, the article remains one of the most provocative and enlightening published on Latin American family history. The apparent point of *Notable Family Networks* was to examine the “model” presented in the article in a broader Latin American context. The idea was a good one, but unfortunately, the book adds little to general understanding of the concept of family clusters or of changing strategies between generations beyond what was already suggested in the article.

While the new case studies on Central America and Northwest Mexico in *Notable Family Networks* establish the development of clusters of notable families in these locales, they also suggest that the particular patterns of family strategies proposed by Balmori and Oppenheimer were not universal throughout Latin America. This finding hardly seems surprising. What is disappointing is that the authors never attempt to explain the differences they encountered. If notable families in Northwest Mexico engaged in exogamous marriage patterns (marrying outside their group) in the first half of the nineteenth century, unlike less peripheral areas, what does that reveal about the relationship of marriage patterns to mode of production? The relationship of the economy or mode of production to family strategies or forms of organization is given little emphasis. The authors seldom argue the reasons why particular strategies are used by family groups in particular circumstances or even the varieties possible within strategies like marriage or inheritance.

The greatest strength of *Notable Family Networks* is the historiographical chapter that brings together an enormous amount of family-related research, most of it completed in the 1970s. One rather strange omission, however, is the absence of any focus on comparative research

on families in the United States or Europe. How unique was the organization of the political economy through family networks? Was it common in other areas but simply continued longer in Latin America? If so, why should that have been the case? Does the existence of notable family networks in Latin America really mean that such families were “the pivot” around which Latin American history (or the politics and economy of same) revolved? For example, can the movement toward a rational centralized state system be perceived as the project of notable family networks? Is the development of class society itself a product of the activities and strategies of family networks? Is there no danger of moving too far from structural explanations of history in analyzing historical transformations as the conscious products of the interworkings of individuals and family groups?

Three of the books under review are set in Mexico. David Walker’s illuminating case study, *Kinship, Business, and Politics: The Martínez del Río Family in Mexico, 1823–1867*, is less interesting as a family history than as a means of analyzing the political economy of Mexico in the first half of the nineteenth century. As Walker states, “the subject investigated is not so much the family as it is the environment in which it moved. Here the family is conceptualized as a discrete social unit that owns certain quantities and qualities of resources useful for advancing its interests in society” (p. 20).

The Martínez del Río family varies from those discussed in other Latin American family histories in that the family originated in Panama and did not develop a network of kin relations in Mexico until the Porfiriato. This absence of family connections within Mexico is judged by Walker to have been a major weakness for the family business when compared with other elite families of the period. Such family circumstances as illness, early death, the failure of marriages attempted, and the simple disinclination of Martínez del Río sons to marry Mexican women limited the important, even critical resources provided by powerful social connections within the local milieu. The Martínez del Río family did have important connections in England, France, the United States, and Panama that were sometimes helpful, but often they were not. The fact that the family had no important kin ties within Mexico is interesting analytically because it allows comparison of the Martínez del Río family enterprise with others, such as the Manuel Escandón family enterprise, that were active in the same period and locale and had the requisite interconnections with important families in the area (p. 15).

Walker rejects the old idea that Mexico’s negative growth rates in this period reflected a lack of energetic and capable entrepreneurs. Successful businessmen were active in early-nineteenth-century Mexico, but as John Coatsworth has argued, “the primary obstacle to economic growth . . . was the lack of a political framework that not only gave the

entrepreneur freedom to manipulate factors in the marketplace, but also guaranteed that society shared in profits" (p. 16). While Walker seems to agree with Coatsworth on this point, he criticizes structural theory for not addressing questions such as why institutional change occurs in one society but is frustrated in another. In Walker's view, the colonial state (a variant of feudalism) organized and administered society in New Spain with the help of corporate interest groups, leaving little institutional space for entrepreneurship: "In this politicized economy, an interventionist state meddled continuously, usually for fiscal ends. Political decisions originating with favoritism, expediency, or even chance distorted the economy, suppressed market forces, and discouraged efficiency and innovation" (p. 22).

Although the state was diminished as an organizing force during independence, the basic organization of society did not change, and the level of economic activity declined. In this environment, "Because political fiat, not economic criteria, continued to be the principal determinant of profit and loss in nearly every sector of the economy, Mexico's empresarios fought among themselves and against other interests to use the resources of an increasingly inept state for personal advantage. In the ensuing political disorder, the ship of state foundered ever deeper and was less able to intervene positively to give needed direction to the economy" (p. 22).

Within this environment, Walker observes, the question became "how to make money in a setting so inauspicious" (p. 10). His micro-economic approach to this question, which entailed meticulously scrutinizing the accounts of the Martínez del Río family within the economic context of the times, yields the most perceptive findings of this study. Walker convincingly argues that (improbable as it seems) lending money at high rates of interest—especially to the Mexican state—was a more secure investment than commerce, agriculture, or industry. Borrowers often went broke, and moneylenders then acquired valuable properties that had been offered as collateral for loans. These properties were unproductive in the short run, however, and the resultant liquidity crisis forced lenders in turn to borrow against them. In this context, the state was the main source of silver via government supply contracts on state monopolies like tobacco or via high public office with top salaries and ample opportunities for corruption. Walker therefore concludes that the "empresarios used the state as a gigantic engine of income distribution." "To make a fortune, the empresario did not rely on income generated from (absent) economic growth. Instead what marked the successful businessman in early national Mexico was intimate access to the political decision-making process" (p. 24).

*The Monterrey Elite and the Mexican State, 1880–1940* by Alex Saragoza studies the "origins of the Grupo Monterrey and its impact on the

relationship between business and government in postrevolutionary Mexico" (p. 1). Saragoza argues that despite the revolutionary doctrines of politicians and parties during this period, "the Garza-Sadas and their allies . . . contributed crucially to the conservative direction of the state after 1940" (p. 207). Citing Nora Hamilton, Saragoza explains the ability of the Grupo Monterrey to influence the state by arguing that "in general, the independence of the state is limited by the socio-economic structure in which it functions to promote private capital accumulation, by the economic power of private capital (both national and foreign), and by divisions within the state and the identification of certain state factions with dominant class interests" (p. 207). In explaining why the Grupo Monterrey achieved this impact, as compared with other family networks, Saragoza points to three interrelated factors: the cohesiveness of the Monterrey elite, the contradictions within the state between political imperatives of reform and the desire for economic development, and the differentiation within the rest of the private sector (pp. 198–99).

The cohesiveness of the Monterrey elite is explained by the distinctive development of the Grupo Monterrey in Mexican history. First, the basic holdings of the Grupo were built by means of native capital. Second, the basis of this development was manufacturing developed in the nineteenth century. Third, the key companies remained essentially family-owned and family-run; and fourth, the major businessmen of Monterrey "forged a closely knit complex of economic social and political interests cemented through joint ventures, cooperative financial arrangements, interlocking directorates and extremely propitious marriage and family ties" (p. 5).

The core of *The Monterrey Elite and the Mexican State* is a blow-by-blow account of the entrepreneurial efforts of the Monterrey families through the Porfirian period and the difficult revolutionary era, up to the confrontation with Cárdenas over labor-management relations. Saragoza views this episode as key to the more conservative political direction taken after 1940. Much emphasis is placed on the Monterrey group's insistence on using native capital to supply an internal market and its resulting independence from foreign capital. Nevertheless, the northern location of Monterrey and the great influx of foreign capital into the area stimulated population expansion and the level of consumer demand for products of the Grupo. During the Revolution, the families suffered from forced loans and fines imposed by revolutionary groups in need of fiscal support. But their cohesiveness as a group and the strength of their industrial development during the Porfiriato brought them through these difficult times capable of maintaining a strong position of influence even within the revolutionary state.

Lomnitz and Pérez-Lizaur's *A Mexican Elite Family, 1820–1980*:

*Kinship, Class, and Culture* is a fascinating and well-written work of historical anthropology that combines the best facets of both disciplines. The authors perceptively combine an understanding of the political economy of each era discussed with analysis of the actions and strategies of the Gómez family members. The issues that concern the authors are family values and the bases for family solidarity, and their book seems to me to be the best published on these topics so far. The basic unit of elite solidarity in Mexico is (and has been) the three-generation extended family, or grand-family, which is maintained over time. This unit is more meaningful for Mexicans than the nuclear family or household unit, and consanguinity turns out to take priority over affinal connections, including marriage. The authors cite four reasons for the continuing solidarity of the Gómez family: family enterprise as a source of patron-client relations and generalized economic exchange; dominant males who are prominent public figures, employers, and protectors of their relatives; centralizing women who gather and disseminate family information; and the Gómez family subculture that has been preserved through ideology and ritual.

The final two books under review concern elite families in Brazil. Darrell Levi's excellent *The Prados of São Paulo, Brazil: An Elite Family and Social Change, 1840–1930* elucidates the role of the elite family in Brazilian history and provides an insider's view into the issues and events of Brazilian history in the nineteenth and early twentieth centuries. Most impressive is the way that Levi integrates the historical development of São Paulo and Brazil and relates it to the fortunes and family strategies of the Prados. In essence, Levi has written a comprehensive history of São Paulo from 1840 to 1930 by using the Prado family as a prism. The resulting book makes a substantial contribution to our understanding of the elite Brazilian family and the history of nineteenth- and twentieth-century Brazil.

One basic difference between Levi's book on the Prado family and Linda Lewin's book on Paraíba is that Levi is interested in the Prado family per se while Lewin is interested in the family only as it relates to Paraíba politics. Personal views and ideology take up a significant part of Levi's book, including differences in political views among family members and examples of times when the Prados did not participate in politics. Lewin takes much less interest in persons than in structures. She perceives family oligarchies as the most efficient form of power structure within the decentralized political system of the Old Republic. These oligarchies did not differ according to economic interests or kind of politics but consisted instead of segmentary competitive groups vying for control over the distribution of resources within municipalities and the state.

Lewin's *Politics and Parentela in Paraíba* is by far the most thorough

study of the relationship of family oligarchy to political process now existing on Latin America. She spends considerable time defining kinship and *parentela*, pointing out that the definition of membership within the family depended ultimately on "individual recognition." Legally, the Brazilian kinship system until 1916 was bilateral, with relationships recognized to the tenth degree. Lewin argues, however, that the system can be more accurately designated as ambilineal with shallow descent groups (p. 128). For example, the naming system used in Brazil until the twentieth century made it possible for even siblings of the same sex to have no surname in common. Lewin states that the names given "conveyed idiosyncratic preference in the status system" (p. 135) and advertised a kind of "pedigree designed to assert claims to political perquisites on the basis of social status" (p. 139).

Lewin's study constitutes a systematic treatise on the complexities and uses of the Brazilian kinship system (in its broadest sense) for purposes of maintaining family patriarchy and political power. Her analysis is insightful and detailed, as when she cites the advantages for most family purposes of a patrilateral parallel cousin marriage (father's brother's daughter or father's brother's son) over other forms of endogamous marriages or demonstrates that the behavior of the Paraíba elite families showed a preference for this type of marriage within the group. She also discusses the relationship of kinship and *parentela* to clientage, with certain types of marriages being utilized primarily to reinforce a familial clientage relationship. Lewin carefully relates family marriage behavior to the historical economic and political reality of the time. For example, she indicates that while endogamy (in-group marriage of numerous varieties) was preferred by elite families in nineteenth-century Paraíba during the Empire, exogamous marriage patterns came to predominate during the Old Republic (1889–1930).

The decline in endogamy was to some degree related to the decline in legal patriarchal authority after 1890, which gave sons in particular more freedom to choose their mates. But Lewin believes that fathers too promoted exogamous marriage precisely because it was in the political interests of the extended family group in the latter part of the Empire (pp. 177, 186–87). She points out the establishment of provincial legislatures and the Senate and Chamber of Deputies at the national level after 1835 as significant in rearranging authority patterns within elite *parentelas* (p. 197). The need to recruit talented brothers-in-law to represent the family network in these new political bodies explains the rise of exogamy in this period. Indeed, Lewin sees brothers-in-law and co-brothers-in-law as a particularly important form of family alliance during this period. The brother-in-law (especially the brother of one's wife) was viewed as more trustworthy than a brother in matters of honor with his sister, yet the brother-in-law functioned as a kind of

peer within a sibling context (pp. 200–209).

In explaining the survival of family-based politics into the Old Republic, Lewin affirms that “socioeconomic change was insufficient for a realignment of group affiliations according to new interests” (p. 225). She also emphasizes the enormous flexibility of the Brazilian kinship system, which allowed a shift in focus to more horizontal modes of organization emphasizing friendship and economic specialization in this period (p. 226). Thus reorganization of the family network permitted placing linked members at local, state, and federal levels, an approach Lewin explains by using the Pessoa family as an example.

The apogee of family-based politics under the Pessoa between 1912 and 1924 also turned out to be the eve of its demise. As Vítor Nunes Leal so perceptively understood in 1949, the phenomenon of *coronelismo* in the Old Republic resulted from the superimposition of structural forms: the continual strengthening of public authority and the declining social influence of the local bosses, especially the large landowners. Increased public authority and resources associated with economic development interacted with the essentially precapitalist society of the interior through the development of the electoral system, which led to expanded resources being siphoned into the less-developed area during the period in which the colonels continued to dominate the backlands.<sup>3</sup> Lewin provides a detailed discussion of the machinations of Paraíba politicians throughout the Old Republic, including insightful discussions of family feuds and the war against banditry.

Yet Lewin’s explanation for what she calls the “demise” of family-based politics is less satisfactory than her elegant analysis of the uses and varieties of family relationships in the nineteenth century. Her explanation is disappointing partly because, as she observes, family politics are still in force at the local level and—although transformed—at the national level. As Lewin notes, adaptations have resulted in family networks that emphasize horizontal sibling and sibling-like relationships. Moreover, interest groups make the family networks themselves more like horizontal class or interest-group relationships. Thus it is not clear in what sense family politics in Brazil can be viewed as dead.

The “demise” of family-based politics is somewhat vaguely attributed to “socio-economic change” in Paraíba (p. 422), the symptom being “the loss of a quasi-corporate identity that accompanied the decline in the elite family’s reliance on a landed base” (p. 424). Lewin’s conclusion again agrees with Nunes Leal’s emphasis on the importance of spatial autonomy and the function of an economy and a distribution of land that keeps rural populations dependent on big landowners.<sup>4</sup>

COMMON THEMES

*Ideology, Gender, and Marriage Strategies*

The first important common theme of these books concerns solidary elite family mechanisms—ritual, ideology, and individual family roles. Certainly, the ideologies of family cohesion and notability were strongly adhered to in the cases described by Levi, Lomnitz and Pérez-Lizaur, Voss, and Saragoza. Voss views ideology as not only sustaining the elite family but constituting part of its genesis in Northwest Mexico: “With the first generation seems to have come a well-established social model to which to aspire: that of becoming, or being, notable” (p. 81). Family ideology also figured in the entrepreneurial inspiration of the Prado family, which in the early nineteenth century was involved in mule trading and small sugar sales. For example, the third Antonio Prado (1788–1875) was exhorted to greater commercial efforts in the name of the family by his mother, who also provided him with details of family finances (Levi, p. 25).

According to Lomnitz and Pérez-Lizaur, family ideology is a “cultural subsystem” that emphasizes the distinctiveness of the group (p. 192), a source of group identity and solidarity, and a charter for socialization and individual action (p. 194). The most prized value is family unity (p. 209), with family rituals, visiting the sick, and ordinary socializing with relatives and friends sometimes taking precedence over work commitments (p. 219). The Gómez ideology has stressed the role of private initiative in Mexican development and exalted the values associated with membership in the family and the Mexican bourgeoisie (p. 192).

One of the ways that ideology is displayed and solidarity is ensured is through family rituals—both public and private. Private rituals include weekly dinner parties, ceremonies and customs surrounding rites of passage, birthday parties, and visiting the sick (Lomnitz and Pérez-Lizaur, pp. 157–91). Public rituals in Monterrey in 1910 included participation in parades and Sunday carriage rides in magnificent style (Saragoza, p. 81). In São Paulo in the 1880s, Veridiana Prado’s weekly soirées provided means of showing off the families’ mansion and Europeanized salon as well as unifying the family (Levi, p. 63). And in Buenos Aires, the two social clubs of Buenos Aires from which Diana Balmori took her sample of 154 notable families—the Sociedad Rural (1866) and the Jockey Club (1882)—undoubtedly provided many opportunities for public family rituals.

Another theme implicit in several of these works is gender, most particularly in the articles by Wilson and Stolcke in *Kinship Ideology and Practice in Latin America*. The function of gender in elite families and the more general position of women in the family in Spanish and Portu-

guese America have become the subject of debate in recent years. Articles defining women's legal position tend to emphasize the relative power of women in a partible inheritance system, in which the right of dowry is protected.<sup>5</sup> Some studies have also shown women as property owners and entrepreneurs who gained independence, particularly after widowhood.<sup>6</sup>

Lomnitz and Pérez-Lizaur find the role of "centralizing women" highly significant to family solidarity. Such women collect and redistribute family information, organize family rituals, and socialize the young to family ideology. Although Levi does not use these terms, his description of the roles of Ana Vicencia Prado and Veridiana Prado (the latter during her "matriarchal" phase) also illustrate the important role of centralizing women in the family. Conversely, Walker's study of the Martínez del Río family may illustrate the absence of family solidarity resulting from not having such women functioning as centralizing forces in the family. At the same time, Lomnitz and Pérez-Lizaur define the Gómez feminine ideal as "to be controlled, to be loyal and to be pure" (p. 212). Women who marry a Gómez are expected "to be wealthy . . . and loyal to their husbands." But Gómez girls are expected to remain loyal to the Gómez family, hopefully pulling their husbands and children into the Gómez circle (p. 231).

This view of female power and involvement in economic activity has been challenged by numerous researchers, including Fiona Wilson (in the Smith volume), Verena Stolcke, Alida Metcalf, Florencia Mallon, and John Tutino. Stolcke's examination of nineteenth-century Cuba led her to conclude that patriarchy, the control of women's sexuality by men, and the domestic seclusion of women were all the norm: "The crucial issue is to understand the ways in which the institutions of marriage and the family lend support to, and serve to perpetuate, social inequality and relations of power, and the particular way in which the subordination of women is one of the prerequisites for the maintenance of social relations of domination."<sup>7</sup> Mallon's discussion of nineteenth-century Peru argues that "it is ultimately patriarchy—understood as a system of material relationships and ideologies whose material base in men's control of women's labor power, reproductive potential and sexuality within the household—that subordinates women." She suggests that beyond economic activity, the evidence points to a fairly high degree of patriarchal control over women, exercised in the household and reinforced through legal and political institutions.<sup>8</sup>

Wilson acknowledges the strong and protected legal position of women with regard to inheritance but argues that women were more likely to receive inheritances of cash, urban properties, or small rural properties than the large properties left to their brothers. She claims that gender differences in inheritance in Andean Peru widened during

the nineteenth century (in Smith, p. 322). Further, Wilson asserts (although she presents no evidence) that one son became "heir apparent" of the family hacienda and gradually acquired the inheritance shares of his mother and siblings (in Smith, p. 307). Like Metcalf, who also argues the "principal heir" position in the case of Parnaíba,<sup>9</sup> Wilson advances a hypothesis based on the sale of properties over a period of time from siblings to one heir in the case of several families. Yet neither Wilson nor Metcalf cites evidence of a conscious plan articulated by any family head to make a particular son the main heir and reunite family properties after their legal distribution among all legitimate heirs. Also, even if daughters were somehow persuaded or coerced to sell property to a "principal heir," they were compensated for doing so, although Wilson suggests that such compensation may have been declining in the nineteenth century.

Tutino argues that within the elite, few men and even fewer women became powerful.<sup>10</sup> Both Tutino and Wilson admit cases of active matriarchs and successful entrepreneurial widows but consider them somewhat exceptional. Wilson believes that because of "the problems and limitations imposed on women by society," most of them "shrank" from the opportunities offered by the legal provisions of property division (p. 318). What is still unclear in these studies arguing the powerlessness of women is the mechanism of sexual subordination that operated in opposition to egalitarian inheritance and property codes.

Another gender issue deals with the women's views of themselves. Stolcke points out that lower-class women would rather stay at home than work (in Smith, p. 285). Furthermore, Brazilian lower-class women see motherhood as "woman's essential attribute" (p. 286). Thus women are implicated in perpetuating patriarchy, as it is normally defined.

Late-eighteenth- and nineteenth-century legislation was generally supportive of individualism and economic liberalism, at least with respect to adult males. Rights of lineage were gradually subordinated to the autonomy of the nuclear household and to the authority of the head of household, particularly if the head were male. For women, however, these changes were ambiguous and frequently contradictory. In most cases, women's individual rights were increased, but not if those rights interfered to any extent with the integrity of the corporate family or the authority of the male head of household.<sup>11</sup> The increased authority of the head of household in the nineteenth century, coupled with new rights for women, created a pressurized situation within the household and family, making some kinds of intrafamily conflict inevitable as women's roles increasingly came into question.

The Prado family history illustrates the patriarchal principle of family rule as well as independence and concern for the individual wel-

fare of members, including daughters. A classic example of patriarchy was the decision of the third Antonio Prado to “make” his daughter Veridiana (then thirteen) marry his brother Martinho (age twenty-seven). It is no wonder that Martinho dominated the marriage for many years. Yet Martinho responded in an opposite manner in 1866 to a marriage proposal from a valued kinsman for his sixteen-year-old daughter Anezia. He replied, “Anezia is still very young and since I do not wish that my daughter marry without completing her little education, I must first say no . . . but will later say yes. [Only] in accordance with her wishes, can what you propose to me be realized” (cited by Levi, p. 43).

Despite the “strongly individualistic” style of the Prados, Levi reports that most late-nineteenth-century marriages in the Prado family were arranged by parents. But in the very late nineteenth and early twentieth centuries, endogamous marriages in the Prado surname extended family were relatively rare, except for the descendants of the most successful branches (p. 105). This trend may have represented a decline in patriarchy, a move away from “rational” marriages, or perhaps (as Lewin argues for Paraíba) a change in strategy to strengthen the family alliances of the weaker branches of the family. A point well made by Lewin, and strongly reinforced by Voss for Northwest Mexico, is that exogamous marriage is just as crucial a strategy for strengthening a family’s economic and political position as is endogamous marriage. As Voss points out, while exogamy lessens the autonomy and control over family resources, new connections can bring new kinds of resources, power, and prestige. The important characteristic for a family with a narrow resource base is flexibility in dealing with new possibilities for family alliances (p. 110).

The relationship of elite marriage and fertility strategies to mode of production is not obvious. Balmori and Oppenheimer’s article and Balmori in *Notable Family Networks* described a pattern of first-generation exogamy (immigrants to native) and second- and third-generation endogamy, with declining fertility from the first through the third generation.<sup>12</sup> Lewin’s and Levi’s studies both suggest that the fourth generation might move again to exogamous patterns. Perhaps one means of understanding this pattern is to look at changes in forms of property and property law over the period. Prior to the late nineteenth century, the most important forms of property were land and slaves, which were generally transmitted through marriage and inheritance. These forms of property and the needs associated with establishing a new household economy in the eighteenth and nineteenth centuries meant that propertied families usually preferred endogamous unions. The circumstances in which exogamous marriages were encouraged seem to have been those in which the family lacked control of or access to some important resource (such as a new area of trade or a political entity). In

that case, as Voss suggests, the family decided that the new connection was worth whatever control was lost by admitting a new family into its network.

New forms of property in businesses and corporations gradually evolved, and the number of urban professions with salaries also increased. The impacts of these trends were diverse. In the first place, new ways were found to control property and prevent its dispersal. Second, children were less dependent on parents to provide the means for establishing a business or setting up a household than they had been before. De la Peña's analysis of changing family relations, urbanization, and economic change focuses on specific issues in individual families during modernization in Jalisco (in Smith, pp. 225–27). His study documents a decline in economic dependence and authority patterns in most classes in the nineteenth century.

Gutiérrez argues that the ideology of marriage was modified in New Mexico in the nineteenth century, with passion and love becoming acceptable reasons for marrying, especially among merchants, artisans, and wage workers (in Smith, p. 256). Recent studies on Mexico and Brazil prove that the use of dowries declined dramatically in both countries by the middle of the nineteenth century.<sup>13</sup> This decline also reflected the changing structure of property and occupations in the nineteenth century, which had important effects on the needs of the family enterprise and the needs of individual children in preparing for marriage. Both effects might explain a preference for exogamy in an industrial or post-industrial society as opposed to a pre-industrial society or one organized around commercial agriculture.

### *Elite Families, Economic Development, and the State*

Several of the books under review address the question of the relationship of family empires to the development of state structure. Some of them argue that family networks in the nineteenth century developed because of the weakness of the state and the absence of capital in this period (Balmori, Voss, and Wortman; Lomnitz and Pérez-Lizaur; Lewin). The implication is that at this time, the state itself was not an actor in the political economy, which (to whatever degree it existed) was controlled by family clusters. David Walker's study suggests, however, that although the state was weak, it still had substantial power to extract resources from citizens for its expenses. Walker also found that loaning money at high rates of interest to the state was the most profitable investment available because of the continued dominance of the state in organizing the political economy even after independence.

Perhaps the development of family empires was inspired partly by the disorganization of the state or its lack of involvement in economic infrastructure in the nineteenth century. But that situation did not keep the state from being an important source of income accumulation, employment, and spending during this period. Also, while it is important not to reify the state, the observation that in most cases a single family cluster alone could not dominate even a local government structure implies that each family cluster existed to some degree in a competitive relationship with other such clusters and with the state. Goals may have often been congruent, but not always. A good example is the repeated demands of governments in this period for loans and other sacrifices from major families whose private economies were likely not served by granting such loans. These elite family studies clearly testify to the important role of native capital and entrepreneurship in establishing economic infrastructures in nineteenth-century Latin America. At the same time, elite families faced the draining demands of governments needing funds to fight wars and develop bureaucratic and educational systems. Little wonder that these families felt entitled to influence governmental bodies to channel public monies into local development projects that indirectly supported elite family enterprises.

Walker argues, however, that Mexican family-based empires had a negative effect on economic and political flexibility within the state: "Self-interest among Mexico's entrepreneurial constituency discouraged institutional change" (p. 25) because the social economy based on mechanisms like kinship and family discouraged economically productive social differentiation (p. 26). The economy and polity of early national Mexico were structured to suit the needs of multifamily alliances and patron-client networks. These family-based groups monitored political and economic activity and limited access to optimal opportunities to their own members. Walker argues that although this system avoided conflict, it also "eliminated challenges to an antiquated economic system. Once integrated, economic actors had more to lose than to gain from making modifications to the system. Because profit continued to be a function of political resourcefulness, there were few incentives for increasing economic productivity" (p. 218). Finally, "fiscal strangulation" from increasing and constant demands on state income led to the inevitable exhaustion of public properties by 1842 and to a bloody civil war and foreign intervention (p. 219).

Walker appears to be pointing to the impact on the grass-roots level of a segmentary authority structure. The juxtaposition of a segmentary social structure with a "liberal" state in the nineteenth century resulted in the authority of family empires expanding on state, re-

gional, and national levels. These intermediate authority patterns and clientage arrangements may have been the most efficient means of organizing the distribution and utilization of resources available in Latin American political economies during this period. Lewin describes how projects for economic infrastructure were promoted during the “reign” of the Pessoa (1912–1924). Certainly, the priorities for public spending in this period were not economically determined. These projects were nevertheless needed and were followed through by the family clusters who had promoted them. The segmentary structure undoubtedly was anti-egalitarian and sometimes irrational from the perspective of the larger economy, but it provided needed organization for completing social goals.

Another factor to consider in thinking about these elite family networks is that before 1850 most elite families were not particularly well-integrated into state or national political arenas—partly because of a lack of representational governing bodies in which to participate before that time. Walker’s study shows elite families struggling to find some remunerative area of investment and being constantly thwarted by war and anarchy. In a similar vein, Saragoza’s study comments on the ability of the Mexican state following the Revolution in 1910 to extract revenues from elite families and private businesses. The Grupo Monterrey were hard put to keep their businesses going during the revolutionary period and at times operated at a loss. Lomnitz and Pérez-Lizaur also discuss the poor fortunes of the Gómez family during the Revolution and their helplessness in the face of political changes and confiscations of property. Thus studies of elites do not always portray families as being entirely in charge of their circumstances. Elite families are presented instead as resilient and having an organization that allows them to face adversity with a united front and to pool various kinds of resources to support the family.

### *Elite Families and Politics in the Twentieth Century*

The relationship of the rise of individualism and class society to elite family solidarity and power in Latin America is a problematic implicit in several of these works. Individualistic concerns such as dowry rights and the right to choose one’s marital partner and occupation have been discussed above. In terms of the elite family as a unit, it appears that in the last half of the twentieth century, economically elite families are much less politically active than in the nineteenth century. Whereas the “notable families” described by Balmori, Voss, and Wortman were most identifiable from the second generation by their complexity in terms of economic and political activities, the “notable families” of today seem content to take a more modest role. Levi reports

that the Prados, who were highly visible architects of the nineteenth century Brazilian state and economy, stayed “at the margins of politics” during the Old Republic (1889–1930) and “never recovered their former political influence” (p. 162).

In the case of the Gómez family of Mexico City, Lomnitz and Pérez-Lizaur conclude that since the Revolution, “the Gómez tend to reject all political activity as basically demeaning” (p. 221). They maintain informal contacts with politicians, contribute to building funds, and organize and fund dinners for governors or congressmen, but they do not participate in party politics. The economic position of the Gómez family has also been revised. After 1960, when family businesses like theirs were displaced by multinational corporations or the Mexican state, the family businesses had to choose between finding new sources of capital or accommodating themselves to middle-range industrial development. Generally, the families have chosen the latter course, which allows them to maintain the same level of control over business and jobs and the same authority structure. Lomnitz and Pérez-Lizaur conclude that “the entrepreneur is not interested in the accumulation of capital for its own sake, but rather as a means for gaining power and prestige” (p. 218). Furthermore, “money is for spending; high living is generosity, because everything is shared with family and friends. . . . Thus, prestige is gotten from money to the extent that it is shared with others” (p. 219).

Saragoza’s thesis of the influence of the Grupo Monterrey on the direction of the Mexican government after 1940 appears to contradict the overall consensus of the decline of family politics in the twentieth century. But he too views the Grupo Monterrey as exceptional among elite family clusters in being able to influence the government.<sup>14</sup> Saragoza’s point has more to do with the necessary limitations of politics within the available economic structure than with the influence of elite families as a common force in politics.

While these books focus on diverse historical and anthropological issues, all of them utilize the family as a kind of entrée or index to understanding Latin American society and political economy. The results of this approach include more complex, sophisticated, and nuanced interpretations of the Latin American reality. Many questions remain to be answered, however, and using the family as a historical tool to illuminate the past from the perspective of the most important actor in Latin American society seems a fruitful approach to answering them.

#### NOTES

1. Raymond T. Smith, “The Family and the Modern World System: Some Observations from the Caribbean,” *Journal of Family History* 3, no. 4 (1978):351.
2. “Family Clusters: The Generational Nucleation of Families in Nineteenth-Century

- Argentina and Chile," *Comparative Studies in Society and History* 21:231–61.
3. Vitor Nunes Leal, *Coronelismo: The Municipality and Representative Government in Brazil* (Cambridge: Cambridge University Press, 1977), 1.
  4. *Ibid.*, 16.
  5. Asunción Lavrin and Edith Couturier, "Dowries and Wills: A View of Women's Socioeconomic Role in Colonial Guadalajara and Puebla, 1640–1790," *Hispanic American Historical Review* 59, no. 2 (1979):280–304; Edith Couturier, "Women and the Family in Eighteenth-Century Mexico: Law and Practice," *Journal of Family History* 10, no. 3 (1985):294–304; Silvia Arrom, "Changes in Mexican Family Law in the Nineteenth Century," *Journal of Family History* 10, no. 3 (1985):305–17; Elizabeth Kuznesof, "Property Law and Family Strategies: Inheritance and Corporations in Brazil, 1800–1960," paper presented at the American Historical Association meeting, 30 Dec. 1984, Chicago; Elizabeth Kuznesof, *Household Economy and Urban Development: São Paulo, 1765 to 1836* (Boulder, Colo.: Westview, 1986), 35–53; and Maria Beatriz Nizza da Silva, *Sistema de Casamento no Brasil Colonial* (São Paulo: Editora de Universidade de São Paulo, 1984).
  6. Edith Couturier, *La hacienda de Hueyapan, 1550–1936* (Mexico City: Instituto Nacional de Antropología e Historia, 1976); Edith Couturier, "Women in a Noble Family: The Mexican Counts of Regla, 1750–1830," in *Latin American Women: Historical Perspectives*, edited by Asunción Lavrin (Westport, Conn.: Greenwood, 1978), 129–49; Asunción Lavrin, "Women in Spanish American Colonial Society," in *Cambridge History of Latin America*, 2:321–55 (Cambridge: Cambridge University Press, 1984); Asunción Lavrin, "In Search of the Colonial Woman in Mexico: The Seventeenth and Eighteenth Centuries," in Lavrin, *Latin American Women*, 23–59; John Kicza, *Colonial Entrepreneurs: Families and Business in Bourbon Mexico City* (Albuquerque: University of New Mexico Press, 1983); Florencia E. Mallon, "Gender and Class in the Transition to Capitalism: Household and Mode of Production in Central Peru," *Latin American Perspectives* 13 (1986):147–74.
  7. Verena Stolcke, "Women's Labours: The Naturalization of Social Inequality and Women's Subordination," in *Of Marriage and the Market: Women's Subordination in International Perspective*, edited by Kate Young, Carol Walkowitz, and Roslyn McCullagh (London: CSE Books, 1981), 30–48.
  8. Mallon, "Gender and Class," 149, 153. Also see Donna Guy, "Women, Peonage, and Industrialization: Argentina, 1810–1914," *LARR* 16, no. 3 (1981):65–89; and Donna Guy, "Lower-Class Families, Women, and the Law in Nineteenth-Century Argentina," *Journal of Family History* 10, no. 3 (1985):318–31.
  9. See Alida Metcalf, "Families of Planters, Peasants, and Slaves: Strategies for Survival in Santana de Parnaíba, Brazil, 1720–1820," Ph.D. diss., University of Texas at Austin, 1983; and Alida Metcalf, "Fathers and Sons: The Politics of Inheritance in a Colonial Brazilian Township," *Hispanic American Historical Review* 66, no. 3 (1986):45–84.
  10. John Tutino, "Power, Class, and Family: Men and Women in the Mexican Elite, 1750–1810," *Americas* 39:359–82.
  11. Guy, "Lower-Class Families, Women, and the Law"; and Arrom, "Changes in Mexican Family Law."
  12. Balmori and Oppenheimer, "Family Clusters."
  13. Lavrin and Couturier, "Dowries and Wills"; Couturier, "Women and the Family"; Margaret Chowning, "A Mexican Provincial Elite: Michoacán, 1810–1910," Ph.D. diss., Stanford University, 1985; and Muriel Nazzari, "Women, the Family, and Property: The Decline of the Dowry in São Paulo, Brazil (1600–1870)," Ph.D. diss., Yale University, 1986.
  14. Compare this treatment with Mark Wasserman, *Capitalists, Caciques, and Revolution: The Native Elite and Foreign Enterprise in Chihuahua, Mexico, 1854–1911* (Chapel Hill: University of North Carolina Press, 1984).