

Professional Leave Report Cover Sheet

Name: Carlos Perez

Department: Chicano & Latin American Studies

College: Social Sciences

Leave taken: ☒ Sabbatical ☐ Difference in Pay ☐ Professional Leave without Pay

Time Period: ☐ Fall
 ☒ Spring 2023
 ☐ Academic Year
 ☐ Other

Your report will be sent to your Dean for your PAF and to the Library Archives.

POST-SABBATICAL REPORT
Carlos Pérez, Ph.D.
Professor (retired)
Department of Chicano and Latin American Studies

In my original proposal, I planned to examine the guano trade in nineteenth century Bolivia during the administrations of José Ballivián (1841-1847) and Manuel Isidoro Belzu (1848-1855) as well as the process of the integration of the port of Cobija into the Bolivian nation-state during these same administrations. When I first submitted my proposal for a sabbatical for Spring 2019 to work on this project I was denied. If I would have had the opportunity to work on this project in Spring 2019, I would have submitted my papers before other scholars that I was unaware of that were working on similar topics.

After receiving the sabbatical for the Spring of 2023, I decided to launch a bibliographical search to see if there was any recent scholarship on this neglected period of Bolivian history and, within that history, the historically neglected topics of guano and the port of Cobija within Bolivian historiography. I discovered that there was a Catalan scholar, Dr. Pol Colàs, that was working on similar topics on nineteenth century Bolivia.

I came upon the following works:

Colàs, Pol (2023). "En los intersticios de la localidad. La institucionalización legal del poder local en Bolivia". *Boletín Americanista*, 87. Barcelona, España, pp. 13-32.
URL: <https://revistes.ub.edu/index.php/BoletinAmericanista/article/view/41501/40733>

Colàs, Pol (2023). "Estado, Iglesia y pueblos indígenas en 'El Cristianismo Católico' de Félix Frías". *Anuario IEHS*, 38 (1). Tandil, Argentina, pp. 11-26.
URL: <https://ojs2.fch.unicen.edu.ar/ojs-3.1.0/index.php/anuario-ies/article/view/1682>

Colàs, Pol (2023). "El congreso de Chuquisaca de 1837 y las costuras del proceso de construcción del Estado en Bolivia". *Revista Complutense de Historia de América*, 49. Madrid, España, pp. 265-285.
URL: <https://revistas.ucm.es/index.php/RCHA/article/view/87990>

Colàs, Pol (2023). “La competencia portuaria entre Arica y Cobija en el advenimiento de la Confederación Perú-Boliviana”. *Nuevo Mundo Mundos Nuevos*, Débats. París, Francia. URL: <https://journals.openedition.org/nuevomundo/91445>

Colàs, Pol (2023). “Estrategias en pugna para el control del guano y la cascarilla en Bolivia”. *Secuencia: Revista de historia y ciencias sociales*, 29 (I). Ciudad de México, México, pp. 1-29.

URL: <http://secuencia.mora.edu.mx/index.php/Secuencia/article/view/1922>

Colàs, Pol (2022). “Ciudadanía armada y construcción del Estado en la reforma militar boliviana de la década de 1840”. *Historia*, 55 (II). Santiago, Chile, pp. 123-147.

URL: <https://revistahistoria.uc.cl/index.php/rhis/article/view/48339>

Colàs, Pol (2022). “Algunas reflexiones sobre el conflicto portuario boliviano durante el gobierno de José Ballivián”. *Anuario de Estudios Bolivianos Archivísticos y Bibliográficos*, 29 (I). Sucre, Bolivia, pp. 59-79.

Colàs, Pol (2021). “El Litoral y el Estado boliviano ante el desafío del guano”. *Boletín Americanista*, 83. Barcelona, España, pp. 79-99.

URL: <https://revistes.ub.edu/index.php/BoletinAmericanista/article/view/35199>

Colàs, Pol (2021). Coordinación y Presentación del Dossier “El despliegue del poder en el escenario local latinoamericano, siglo XIX”. *Boletín Americanista*, 83. Barcelona, España, pp. 9-13 (dossier entero pp. 9-120).

URL: <https://revistes.ub.edu/index.php/BoletinAmericanista/article/view/35197>

Colàs, Pol (2021). “Félix Frías y el giro a los Orientes bolivianos de José Ballivián”. *Revista de Indias*, LXXXI (283). Madrid, España, pp. 799-831.

URL: <https://revistadeindias.revistas.csic.es/index.php/revistadeindias/article/view/1505>

Colàs, Pol (2021). “‘Bolivia recibirá el provecho siendo impulsado el solo puerto que posee’. Cobija y el Litoral entre el poder local y la administración de José Ballivián (1841-47)”. *Estudios Atacameños*, 67. Antofagasta, Chile, pp. 1-27.

URL: <https://revistas.ucn.cl/index.php/estudios-atacamenos/article/view/3745>

Colàs, Pol (2021). “Auge y caída de José Ballivián en Bolivia (1841-1847). Construcción y derribo de la batalla de Ingavi como base legitimadora”. *Anuario de Estudios Americanos*, 78 (1). Sevilla, España, pp. 257-290.

URL: <https://estudiosamericanos.revistas.csic.es/index.php/estudiosamericanos/article/view/913>

Colàs, Pol (2019). “Auge y caída de Andrés de Santa Cruz y su Confederación: el «imperio de la traición» y la legitimación caudillista”. *Boletín Americanista*, 79. Barcelona, España, pp. 47-67.

URL: <https://revistes.ub.edu/index.php/BoletinAmericanista/article/view/25616>

Colàs, Pol (2019). “La escritura epistolar como fuente y agente de la historia: el caso del caudillismo boliviano”. *Fuegia. Revista de Estudios Sociales y del Territorio*, II (1). Ushuaia, Argentina, pp. 33-40.

Colàs, Pol (2019). “Una aproximación historiográfica al “caudillo” Andrés de Santa Cruz”. *Naveg@mérica. Revista electrónica editada por la Asociación Española de*

Americanistas, 22. Murcia, España, pp. 1-31.

URL: <https://revistas.um.es/navegamerica/article/view/363621>

His publications span the years of 2019 to 2023, 2019 being the year that I initially sought the sabbatical. Dr. Pol Colàs in his article, “Estrategias en pugna para el control del guano y la cascarilla en Bolivia”, cites the importance of my work for an understanding of this period in nineteenth century Bolivia. He writes the following:

Por ello, los trabajos de Carlos Pérez son clave para entender la relación de la cascarilla con su entorno, la vía de salida hacia Arica y La Paz, centro del comercio del recurso en la década, su papel en la construcción del Estado republicano incipiente y la existencia de contrabando y bandidaje cascarillero en la época.

(For this reason, the works by Carlos Pérez are key for an understanding of the relationship of quinine within its context, the export route to Arica and La Paz, the commercial area of this resource during the decade, its role in the construction of the emerging republican state and the existence of contraband and banditry in the commerce of quinine during the era.)

After discovering this scholar’s work, I contacted him. He responded with the following email:

Estimado Dr. Pérez,

Es para mí un placer que haya contactado conmigo y un honor que se haya fijado en mis trabajos. Sus estudios han sido vitales para mis últimos textos, más aún para un artículo que salió hace bien poco en la revista *Secuencia de México*, donde hago una comparación entre el trato dado a la quina y al guano por parte del gobierno boliviano de la época.

Actualmente estoy acabando mi tesis doctoral, pero me gustaría seguir trabajando tales temáticas, sobre todo alrededor del guano y el Litoral, siempre y cuando tenga la oportunidad de poder seguir por este camino.

Veo que usted trabaja en Fresno. Pude estar allí durante una estadia de investigación que llevé a cabo en Davis el año pasado, es un bonito lugar. Ojalá pueda volver pronto por esas tierras.

Saludos cordiales,

Pol Colàs

(Dear Dr. Perez,

It is a pleasure for me that you contacted me and an honor that you have taken notice of my work. Your studies have been vital for my recent work, especially for an article that was recently published in the journal *Secuencia de México*, where I compare the strategy taken by the era's Bolivian government regarding quinine and guano.

I am currently finishing my doctoral dissertation, But I would like to continue working on these topics, especially on the relationship between guano and [Bolivia's] coast, if I am given the opportunity of following these investigations.

I see you work in Fresno. I was around there when I had the opportunity to conduct research last year, it's a beautiful place. Hopefully I can soon return to those lands.

Pol Colàs)

Also, a Colombian scholar and an Ecuadorian scholar have recently completed a dissertation and a thesis on the port of Cobija:

Jeminio Arnez, Kathya R. "A espaldas vueltas, memorias muertas. La cotidianidad de Cobija, puerto Lamar y las tareas de los prefectos (1864-1871)." Diss. Universidad Nacional de Colombia, Medellin, Colombia, 2015.

Vargas Mansilla, Stephanie Carola. El encierro del espacio nacional boliviano visto desde Mejillones de 1842 a 1866. Quito, 2018, 125 p. Tesis (Maestría en Historia). Universidad Andina Simón Bolívar, Sede Ecuador. Área de Historia.

In light of this recent scholarship, I had to immerse myself in reading these works and reevaluate my own work in order to incorporate them in my work. I spent the sabbatical reading all of Colàs' work as well as the dissertation and thesis on the port of Cobija.

I also came upon a recent collection of nineteenth century Bolivian newspapers, La Epoca, El Eco de la Opinion, El Restaurador and others, that I researched for my investigations for these topics. I translated those articles that would support my analysis on guano and Cobija.

Therefore, I was not able to complete the articles as I originally envisioned them since I had to assimilate this recent scholarship into my own analysis. I have gone back to rewrite the drafts of those original articles that I was hoping to complete in the Spring of 2019. Although retired, I

plan to continue my investigation of these topics and the period of nineteenth century Bolivian caudillo politics.

SABBATICAL PROPOSAL
DR. CARLOS PÉREZ
ACADEMIC YEAR 2021-2022

I am requesting a sabbatical leave for Spring 2023 during the academic year 2022-2023. I have not taken a sabbatical leave in the past. The sabbatical would be dedicated to completing two different articles on nineteenth-century Bolivia's economic and political history:

a. British Free Trade vs. Bolivian Protectionism: The Case of Manuel Isidoro Belzu's April 7, 1849 Decree

b. "Where's the Guano?" The Origins of the Guano Trade in Nineteenth-Century Bolivia

I have abundant documents, treaties, reports, pamphlets, British consular reports, etc., on the guano trade during the administrations of José Ballivián (1841-1847) and Manuel Isidoro Belzu (1848-1855) that I have translated and transcribed. Exploiting the Peruvian guano trade in the early 1840s, British merchants saw new opportunities in Bolivia and sought to penetrate the Bolivian guano fields located on the coast surrounding the port of Cobija. Under Ballivián, the British sought free trade for guano, while the *caudillo* Belzu, who overthrew Ballivián, instituted protectionist policies, causing a major rift with Great Britain.

After my research in Bolivian archives, I realized the importance of the British consuls and vice-consuls for an understanding of *caudillo* politics during this early period of nation-state formation. In the summer of 2016, I conducted research on the role of British consuls and merchants in early nineteenth-century Bolivia at the British Foreign Office archives, London, England. Also, in the summer of 2018, I visited the Antony Gibbs and Sons Limited business archives, one of the major British commercial houses in South America during the nineteenth century, located in the London Metropolitan Archives. I also visited the British Library, which

has a Latin American newspaper collection. I have transcribed the documents that I collected from these various British archives.

The role of British Vice-Consul Charles Masterson during the Ballivián administration is crucial because he was responsible for the ratification of the 1840 treaty between Great Britain and Bolivia. This treaty is fundamental for an understanding of not only the economic relationship between British capital and its penetration into the Bolivian export market but also the struggle between free trade and protectionism. After independence, Latin America presented many opportunities and challenges to foreign merchants that wanted to engage in trade in these new markets. As R.A. Humphreys states, “Much of the trade was British trade. A majority of the merchants were British merchants.” In these politically chaotic nations, the consuls and vice-consuls played an extremely important role in opening up markets, defending merchant interests, reporting about economic opportunities and natural resources in the new nations, etc. Furthermore, Humphreys poses the following research agenda in his paper “British Merchants and South American Independence”, “... the arrival of the foreign merchant, and the beginnings of foreign capital investment, ..., still await their historian.” At present, this research agenda has not been undertaken for nineteenth-century Bolivia. A study of Masterson’s activities during the Ballivián administration and Frederick W.A. Bruce, H.B.M. Chargé d’ Affairs, during the Belzu administration would contribute to filling in this lacuna regarding Bolivia during the early republican period. My early research was on the cinchona bark trade during the Ballivián and Belzu administration, a trade that at times was in the hands of British merchants. This present work builds on my previous work on Bolivian *caudillos* and the relationship between the export economy and national politics.

The British consuls and vice-consuls played a pivotal role in facilitating the penetration of British capital into the opening markets of Latin America. From 1841-1847, foreign penetration into the national economy benefited from the opening of the economy under Ballivián. The ratification of the 1840 Treaty of Friendship, Commerce and Navigation gave excessive economic benefits to British merchants. In Sucre, the nation's nineteenth-century capital, protectionists and free traders engaged in strong debates during the negotiations regarding the treaty. Ballivián, aware of the nature of the treaty and its detrimental effects on the interests of the Bolivian merchants, commented to the British consul Charles Masterton that he would ratify it "notwithstanding the decided and universal disapprobation of the nation in respect of the treaty, taking the whole odium of the business on myself; and I trust that you will inform your govt. that, against the opinion of my counsellors and of the country, I take this decided step as a proof of my sincere desire to keep faith and cultivate harmony with the British nation." Masterson defended British merchants and their economic interests against the challenge presented by the Bolivian merchants.

We can consider the early phase of nineteenth-century British free trade imperialism in Latin America as the arena where the contending forces of globalization and resistance to it would shape the subsequent development of Bolivia's insertion into the global market and its national development. In Bolivia, the crucial phase from 1825 to 1870 would be characterized not only by *caudillo* politics but also by the expansion of British free trade imperialism. Ballivián, with the advice of the vice-consul, would contribute to this process, which led to the emergence of Manuel Isidoro Belzu, a protectionist that championed the anti-globalization forces and lower classes during this critical period of early nation-state development as he tried to construct an alternative path for Bolivia's economic, political, and social development.

Besides my research in Bolivian and British archives, in the past I have conducted research and located primary documents in U.S., Bolivian, Argentinean, Chilean, and European archives, such as the rich collection of personal letters by nineteenth-century caudillos deposited in the Acosta Lanza Collection of Bolivian Manuscripts held by the Harry Ransom Humanities Research Center at the University of Texas, Austin, the Archivo y Biblioteca Nacionales de Bolivia, Sucre, Bolivia, and the British Foreign Office, London, England. I have translated the Spanish language documents into English and transcribed them.

Since I last received the College of Social Science Research Grant (2004-2005), I presented some of my research findings at the following conferences:

Chair/Discussant. “‘Guano Maldito’: The Origins of the Guano Trade in Nineteenth Century Bolivia.” 2007 Conference of the Pacific Coast Council on Latin American Studies. “Latin America: Peoples and Possibilities.” November 2nd and 3rd, 2007. Session: Primary Goods and Commodities. November 2, 2007. Claremont McKenna College, Claremont, California.

“‘Apres Moi, Le Deluge’: José Ballivián in Exile.” 2006 Conference of the Pacific Coast Council on Latin American Studies. “Cambia, Todo Cambia ... Change in Latin America.” November 3rd and 4th, 2006. Session: National Projects in Historical Perspective: Nineteenth-Century Caudillismo and Twentieth-Century Populism(s). November 3, 2006. California State University, Dominguez Hills, Carson California.

“Bolivian Popular Resistance to Nineteenth Century Globalization.” 2006 Hawaii International Conference on Social Sciences. May 31 – June 3, 2006. Session Topic: Area Studies – Latin America. June 2, 2006. Honolulu, Hawaii.

“The Origins of the Guano Trade In Nineteenth Century Bolivia.” Third International Congress of the Bolivian Studies Association. February 24-26, 2005. Panel on History. February 26, 2005. Florida International University, Miami, Florida.

I have also published the following articles based on my previous research:

"The Political Origins of the Cinchona Bark Lobby of La Paz, 1840-1847," Bolivian Studies Journal, volume 14 (2007), 213-234.

"Bolivia's Failed Effort at Early Nineteenth Century Economic Nationalism: The Aramayo Hermanos Contract and the Economic Crisis of 1850-1851," Bolivian Studies Journal, volume 10 (2003), 157-176.

"El bandidaje político en la frontera de la cascarilla: el caso de Juan José Pérez, "Almanaque Historico Latinoamericano, no. 10 (2003) Moscow, Russia, 41-60. (in Russian)

I will utilize my time to continue my research, write and subsequently submit papers which will benefit the University's instructional program because it is a study of a relatively neglected country, Bolivia, in Latin American Studies and put it in the context of world economic and political history. It will also contribute to an understanding of international trade relations during the nineteenth-century between Latin America and Great Britain. I will be able to create upper-division courses for the Department of Chicano and Latin American Studies that would emphasize the Andean region, in general, and Bolivia, in particular. Also, it would allow me to create a course on Britain and Latin America during the nineteenth-century as well as one on the folk *caudillo* in nineteenth-century Latin America. It would also allow me to broaden a student's understanding of the underlying factors that contributed to nation-state formation in Latin America during the long nineteenth-century and enhance the topics I teach in my General Education course, Introduction to Latin America (CLAS 170). In this course, I study in some detail the formative phase of nation-state formation in the nineteenth-century as outlined in Dr. E. Bradford Burns' seminal work, The Poverty of Progress. Also, particular courses on nineteenth century Latin America, caudillo politics, social banditry, popular revolts and rebellions, the role of the masses in Latin American politics, Latin American environmental history, and myriad other courses could be developed on the upper and lower division levels. These courses would greatly enhance the offerings for the B.A. in Latin American Studies.

The successful completion of the above articles will lay the foundation for the following two projects:

- a. Project concerning the integration of the port of Cobija into the Bolivian nation-state during the Age of the *Caudillos* (1826 - 1872)

b. Project on the role of the British consuls and merchants in early nineteenth-century Bolivia (1840 – 1853)

TIMELINE

January – February 2023: Complete and submit article “British Free Trade vs. Bolivian Protectionism: The Case of Manuel Isidoro Belzu’s April 7, 1849 Decree”

March – May 2023: Write, complete, and submit “Where’s the Guano?’ The Origins of the Guano Trade in Nineteenth-Century Bolivia”

No CSU resources will be necessary.

Dr. Carlos Pérez
Professor
Department of Chicano and Latin American Studies
College of Social Sciences