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INSURGENCY IN MEXICO: THE WAR FOR INDEPENDENCE, 1810-1821

BY

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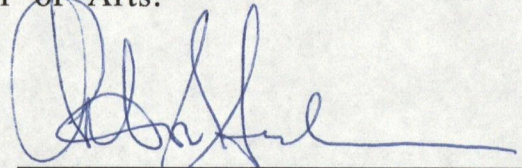
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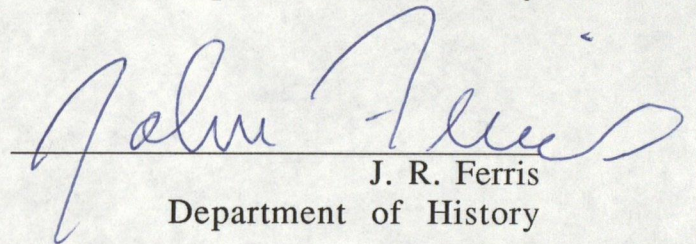


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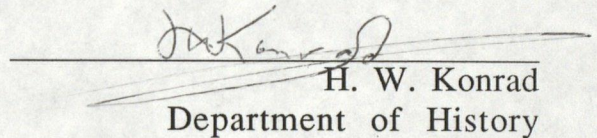
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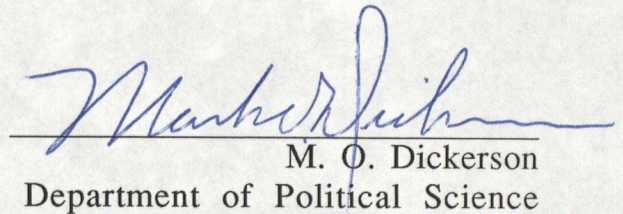
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## Abstract

On September 16, 1810, Father Miguel Hidalgo y Costilla launched an insurrection to oust from power the European Spaniards who previously dominated Mexican society and install in their place American born creoles. However, this limited objective was soon eclipsed by the violent responses of Mexico's lower classes. Prior to 1810, the conditions endured by the poor in rural New Spain deteriorated dramatically. Mexico's 'tributary' classes grasped Hidalgo's projected creole revolution as an opportunity to right past wrongs. Insurgency developed in the countryside. Numerous regional chieftains or *cabecillas* led small landowners, rural laborers, and dislocated urban workers in pursuit of goals which threatened both the hated *gachupines* and the creoles themselves.

The initial insurrection passed beyond the control of the original creole leadership. After their demise, the insurrection devolved into a fractious proliferation of regional insurgencies. Regional *cabecillas* pursuing independent agendas which, on the surface, differed little from outright brigandage undermined attempts by Ignacio Rayón and Father José María Morelos to create a concerted revolution from the increasingly atomized insurgency.

Moreover, royalist counterinsurgency initiatives developed by Félix María Calleja frustrated rebel attempts to revive the revolution for independence. Regular army units, garrisoned in strategically located positions to contain the rebel threat, acted in conjunction with mobile detachments that ranged beyond established royalist zones applying constant pressure on the insurgents. To prevent the

reoccupation of territories liberated by royalist troops, Calleja armed the civilian population in its own self defense.

However, the continued presence, to 1816, of a large disciplined rebel army under the direction of Morelos in the south of New Spain, drew the attention and resources of the viceregal authorities away from regional counterinsurgency efforts. With the decline of Morelos, the royalists focused their attention on the dispersed rebel threat. Unable to challenge the royalists in open confrontations, the insurgents fortified themselves in inaccessible retreats from which they made periodic forays into pacified territories. Preferring to conduct their own operations, regionally autonomous royalist commanders often impeded coordinated efforts to mount campaigns to reduce these persistent insurgent foci.

Insurgency became entrenched in society. After 1816, Viceroy Juan Ruíz de Apodaca combined Calleja's counterinsurgent policies with an extensive amnesty program to bring the war to a conclusion. However, inured to military life, many amnestied insurgents resumed their careers as guerrilla-bandits. Similarly the opportunism of pardoned rebel cabecillas blunted the impact of the amnesty program. Unable to root out insurgency, royalist commanders began to normalize relations with the insurgents. The army became a vehicle to attain wealth and influence more than an effective tool of war. By late 1820, self-preservation preoccupied both the rebels and the royalists. A new *status quo* emerged from the insurgency forming the basis of Mexico's independence. Not only did military power become the key to the security of royalist and insurgent commanders but also to independence.



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I would like to thank a number of people for their assistance in the preparation of this thesis. I owe my greatest debt to my supervisor Dr. Christon Archer. He encouraged me to pursue high standards in my work and freely shared his own wealth of experience to guide me through what have been two rewarding years of study. Discussions with Professors John Ferris and Doug Peers also contributed in no small way to the resolution of the innumerable problems which arose in the course of researching and writing this thesis. Of those other members of the faculty and staff in the Department of History who surely deserve my thanks, I would especially like to convey my gratitude to Liesbeth von Wolzogen for both her technical assistance and comforting interest in my progress over the course of these past years.

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The deepest thanks that I have to give I must pass on to my family. Over the years my brother Keith has proven to be the greatest of friends whose constant companionship has done much to inspire my work. Although many miles have, at times, separated me from my parents, their understanding, support, and love has easily transcended the distance between cities. When the world comes crashing down on our heads, as it too often does, a quick call to one's parents is most often sufficient to restore the proper order of things. Perhaps because of my youth I'm not certain how such minor miracles are possible, but I will be forever thankful for them. However they came to be, I would like to express my love and thanks to the authors of these miracles, Wayne and Delia Hogue.

Ken Hogue  
05/18/90

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## Introduction

Traditionally, historians have explained Mexican independence by emphasizing the unexpected defection, in early 1821, of the royalist army to the insurgent side. In this view, the royal army, after having defeated the insurgent threat, betrayed the cause of the crown as part of a conservative reaction against the restoration, in 1820, of the Spanish liberal constitution.<sup>1</sup> However, closer examination of the origins, progress, and consequences of the insurgency that disrupted Mexican society after September, 1810, demonstrates that independence was not simply a matter of betrayal or reaction prompted by external events. Exhausted after over a decade of intense civil war and eager to retain the power and influence that they had accumulated during the years of insurgency, military commanders - royalist and insurgent alike - opted to pursue

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<sup>1</sup> This view is explicit in the works of numerous historians. It has characterized the historiography of Mexican independence since Mexico's own nationalist historians first began to record the history of the independence era in the 1830's. Lucas Alamán produced the most detailed account that followed this interpretation. Lucas Alamán, *Historia de Méjico desde los primeros movimientos que prepararon su independencia en el año de 1808 hasta la época presente*. 5 vols. 2d ed. (México: Editorial Jus, S. A., 1968). In 1973, John Lynch reasserted this position in his work, *The Spanish American Revolutions, 1808-1821* 2d ed. (New York: W. W. Norton and Company, 1986), 319 passim. Five years later, Timothy Anna, his work *The Fall of the Royal Government in Mexico City* (Lincoln: University of Nebraska Press, 1978), asserted that after 1816 the "royal regime reestablished itself [and] spread its effective control gradually over all the nation." Five years later in 1821, acting out what Anna referred to as "the ultimate contradiction," Agustín de Iturbide defected to the insurgent side with the vast majority of the royal army in pursuit of independence. Ibid., 179, 191. See also, Romeo Flores Caballero *Counterrevolution* trans., Jaime E. Rodríguez O. (Lincoln: University of Nebraska Press, 1974).

independence on their own terms. Independence, as the traditional interpretation suggests, was, in part, a reaction to external events. Beyond this, however, independence demonstrated that the military had emerged as the preeminent political power in society. And only by examining the internal dynamics of insurgency can the nature and basis of this power be understood.

The independence movement began as a creole attempt to secure greater autonomy within the Spanish imperial system. In the wake of the political crisis generated by the fall of the Bourbon monarchy in Spain to Napoleon in 1808, creole efforts in this direction were primarily political and peaceful. The *golpe de estado* engineered by the European Spaniards against Viceroy José de Iturigaray to extinguish the creole movement for autonomy radicalized prevailing attitudes. Creole Spaniards, long relegated to subordinate positions in society, now turned to more violent expedients to throw off the yoke of Spanish control.<sup>2</sup>

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<sup>2</sup> Colin M. MacLachlan and Jaime E. Rodríguez O., *The Forging of the Cosmic Race: A Reinterpretation of Colonial Mexico* (Berkeley: University of California Press, 1980), 301-309. The "autonomy" interpretation of the 1808 activities of the creoles in Mexico City contradicts the traditional view developed by Lucas Alamán that echoed contemporary conservative opinions held by those Spaniards who eventually overthrew Viceroy Iturigaray and postponed the resolution of the question of political authority in New Spain. Alamán, *Historia de Méjico* 1: 120-174. For an illuminating discussion of the social structure of colonial Mexico see, Lyle McAlister, "Social Structure and Social Change in New Spain," *Hispanic American Historical Review* 43:3 (1963): 349-370. Briefly summarizing the status of the creoles in colonial society David Brading wrote that "not all whites belonged to the respectable classes, but all the respectable were white." During the era of the Bourbon Reforms, favoritism granting European Spaniards monopolistic control over the premier positions in the bureaucracy, the army, the Church, and, to a certain degree, the economy, frustrated creole aspirations to secure their place among the *gente decente*. David Brading, *Miners and Merchants in Bourbon Mexico, 1763-1810* (London: Cambridge University Press, 1971), 20-22.

In the summer of 1809, creoles in Valladolid (Morelia) conspired to secure independence from Spain. This plot, the successor to earlier plans to rid the realm of gachupín rule, collapsed in the winter of 1809. The viceregal authorities, sensitive to their own declining popularity, had stepped up the activities of the Inquisition and established a Court of Good Order and Security to suffocate all subversive activities. Despite having uncovered the Valladolid conspiracy, viceregal officials feared dealing out harsh punishment to the guilty parties. The quiet release of the Valladolid conspirators demonstrated the weakening of the viceregal position. Sedition remained thick in the air and a new conspiracy formed in Querétaro in December, 1809. Nine months later, the Querétaro conspirators, led by Father Miguel Hidalgo, began an armed struggle to free New Spain from peninsular domination.<sup>3</sup>

The popular response to Hidalgo's movement exceeded all expectations. Recent historical studies have attempted to explain the popularity of Hidalgo's revolt by examining changing conditions in society during the late eighteenth century.<sup>4</sup> Concentrating on the

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<sup>3</sup> For information on conspiracies in New Spain prior to 1810, see Christon Archer, *The Army in Bourbon Mexico, 1760-1810* (Albuquerque: University of New Mexico Press, 1977), 102-105, 280-282, 291, 295. On security measures effected by the viceregal authorities after the golpe of 1808, see, Hugh Hamill jr., *The Hidalgo Revolt, Prelude to Mexican Independence* (Gainesville: University of Florida Press, 1966), 13, 224 n.32.

<sup>4</sup> The ever increasing number of studies which examine developments within the context of the late eighteenth century has prompted historian Woodrow Borah to suggest that some historians have become inclined to question the significance of the independence era as a watershed in Mexican history. In her commentary on the state of Mexican historiography, Peggy Korn observed that new directions suggest that conditions during the era of the Bourbon Reforms, particularly the dislocations which these initiatives generated, combined with a new ideology of protest and dissent emanating out of the Enlightenment and the French Revolution to produce a "new revolutionary



commercialization of agriculture after 1750, historians such as Cheryl Martin and Eric Van Young have elaborated the preconditions for the Hidalgo revolt. According to Martin and Van Young, expanding demand, generated by sustained population growth and accelerated urbanization, led to increased production of such consumer items as sugar and wheat. Land owners improved and expanded their holding to capitalize on increased levels of demand. The growing prosperity of landowners was won at the expense of the poorer classes.<sup>5</sup> As John Tutino has suggested, impoverished rural villagers experienced a precipitous decline in both security and autonomy due to the shifting basis of agriculture.<sup>6</sup> The incidence of violent protest in the countryside increased accordingly. In the years immediately preceding the Hidalgo revolt, hostilities in the countryside became particularly pronounced.<sup>7</sup>

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state of mind." Intellectually, at least, the break with Spain had already occurred. Woodrow Borah, "Discontinuity and Continuity in Mexican History," Pacific Historical Review vol. 48 (1979): p. 3; Peggy K. Korn, "Topics in Mexican Historiography, 1750-1810; The Bourbon Reforms, The Enlightenment and the Background of Revolution," *Investigaciones contemporáneas sobre la historia de México: memorias de la tercera reunión de Historiadores Mexicanos y Norteamericanos*, Oaxtepec, Morelos, 4-7 de noviembre de 1969 (México: Universidad Nacional Autónoma de México, 1971), 176.

<sup>5</sup> Cheryl English Martin, *Rural Society in Colonial Morelos* (Albuquerque: University of New Mexico Press, 1985); Eric Van Young, *Hacienda and Market in Eighteenth-Century Mexico: The Rural Economy of the Guadalajara Region, 1675-1820* (Berkeley: University of California Press, 1981).

<sup>6</sup> John Tutino, *From Insurrection to Revolution in Mexico: Social Bases of Agrarian Violence, 1750-1940* (Princeton: Princeton University Press, 1986), 61-82.

<sup>7</sup> Although the number of incidents increased in the years before 1810, they tended to remain isolated from one another. Nothing on the scale of the Thupa Amaru II revolt in Peru occurred in New Spain as a precursor to independence. William B. Taylor, *Drinking, Homicide and Rebellion in Colonial Mexican Villages* (Stanford: Stanford University Press, 1979), 113-115.

Certainly such factors as the commercialization of agriculture contributed to the long term origins of Hidalgo's massive popular revolt. Yet, few historians have attempted to analyze the immediate origins and the expansion of the insurgency between 1810 and Hidalgo's demise in 1811. The potential for revolt, most historians agree, increased dramatically with the onset of dearth in 1808. For two years, the lower classes in New Spain suffered the appalling effects of natural disaster in the form of drought and frost which were, in turn, magnified by the imbalances inherent in the system of agriculture characteristic of the eighteenth century.<sup>8</sup>

Populations uprooted by this crisis provided the manpower for Hidalgo's revolt. Yet, explanations of how discontent was converted into action have been less forthcoming. The same holds for explaining the rapid contagion of the revolt throughout much of New Spain. The most thorough study of the Hidalgo revolt, written by Hugh Hamill, implies that the huge army raised by Hidalgo simply appeared at the bidding of the creole conspirators.<sup>9</sup> Moreover, reading Hamill, it is difficult not to conclude that it existed as nothing more than a mindless horde bent to the purposes of the creole leadership of the insurrection:

the peasants were . . . incapable of producing  
leaders because of ignorance and suppression.  
The lot fell, then, chiefly to the American

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<sup>8</sup> John Tutino, *From Insurrection to Revolution*, 119-126; Brian Hamnett, *Roots of Insurgency: Mexican Regions, 1750-1824* (Cambridge: Cambridge University Press, 1986), 102 *passim*.

<sup>9</sup> Hamill, *The Hidalgo Revolt*, 121.

Creoles to control the political sympathies of  
the non-spanish peoples.<sup>10</sup>

Hamill's assertion vastly oversimplifies the question of leadership and the range of interests which motivated the Mexican people to participate in the insurgency begun under Hidalgo.

Several more recent historical works have begun to correct the deficiencies of Hamill's argument. In his work, *Roots of Insurgency: Mexican Regions, 1750-1824*, Brian Hamnett pointed out that the primary leaders of the independence revolution depended on the "diffuse private power" and authority of individuals and interest groups in order to mobilize popular support. These *caciques*, Hamnett argued, did not originate in the independence period, but "existed as a recognizable phenomenon" during the colonial era. The independence war magnified their influence and expanded their "sphere of operations."<sup>11</sup>

Although Hamnett's work clarifies the nature of leadership during the independence war, his discussion of *caciquismo* focuses more on the period after the demise of Hidalgo. In the present study, the first chapter addresses the following questions: How did Hidalgo mobilize mass support for his insurrection against Spanish authority? To what extent did the creole leadership depend on an intermediate group in the pursuit of this end? Furthermore, while answering these broad questions, chapter one analyzes the degree to which the lower

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<sup>10</sup> Ibid., 43.

<sup>11</sup> Hamnett, *Roots of Insurgency*, 55. Where Hamnett uses the word *cacique* (chief or boss), this study, following the usage found within the vast majority of primary documents consulted, will use the term *cabecilla* to denote local notables and military commanders participating in the insurgency.



classes were capable of forming and acting upon their own interests. Were the popular classes in fact the unthinking mob identified by Hamill and others? And, how did the presence of divergent interests effect the progress of Hidalgo's revolt and the insurgency more generally?

After the royalists captured Hidalgo in March 1811, the outward character of the independence movement changed dramatically. The Hidalgo revolt devolved into a fractious insurgency beset by chronic internal political struggles between competing military *cabecillas*. In their rush to establish the period after 1811 to at least 1814 as one of insurgent ascendancy, historians, particularly Mexican nationalists, have often passed over this fact.<sup>12</sup> The zeal of Mexican historians to glorify their national heroes has transcended the boundaries of Mexico itself. Lesley Simpson, an American historian, portrayed Father José María Morelos as a true social revolutionary, the supreme political leader of the insurgent cause, and as a brilliant military strategist.<sup>13</sup> The net effect of this preoccupation with the insurgents and their deeds, as Hugh Hamill points out, has been to distort contemporary understanding of Mexican independence. Shifting the focus onto the royalists and their counterinsurgency strategy, Hamill attempted to assert the

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<sup>12</sup> See, for example, José Bravo Ugarte, *Historia sucinta de Michoacán* 3 vols. (México: Editorial Jus, S. A., 1962), vol. 3, pp. 20-50.

<sup>13</sup> Lesley Byrd Simpson, *Many Mexicos* 4th ed., rev. (Berkeley: University of California Press, 1966), 218-222.

significance of the "Other Side in Mexico's war for independence."<sup>14</sup> Contrary to the tautological works glorifying the insurgents, Hamill convincingly argued that the insurgent forces, after 1811, became "atomized" and that the initiative passed into the hands of the royalists.<sup>15</sup>

Despite his concentration on the development and implementation of royalist counterinsurgency policies, Hamill failed to abandon the traditional periodization and interpretation of Mexican independence. Echoing the principal assumption that underlies the explanation of independence put forward by Lucas Alamán, Hamill stated that by 1816 the royalists crushed the insurgents.<sup>16</sup> With the defeat of the rebels at this stage, the way was cleared for the triumph of the conservative counterrevolution of 1820-21.<sup>17</sup> The primary task of the second chapter, then, will be to challenge the contention that the insurgency begun under Hidalgo

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<sup>14</sup> Hugh Hamill, jr., "Royalist Counterinsurgency in the Mexican War for Independence: The Lessons of 1811," Hispanic American Historical Review 53 (1973): 470.

<sup>15</sup> Ibid., 471-472.

<sup>16</sup> Ibid., 472.

<sup>17</sup> The traditional view of Iturbide's revolution as a reactionary development has been challenged in recent years by Doris Ladd and Timothy Anna. Ladd argued that the view of the traditional colonial élite casting off its ties with Spain in order to preserve existing privileges and rights overestimated the real facts. Anna, like Ladd, emphasized the diverse range of interests which lent their support to Iturbide's Plan de Iguala. In light of this, Anna argued that independence in Mexico could be described as neither a counterrevolution nor a revolution. Instead, Anna proposed that it be explained as a massive compromise of such grand dimensions that it pleased no one beyond the immediate moment. Doris Ladd, *The Mexican Nobility at Independence, 1780-1826* (Austin: University of Texas Press, 1976), 125-131; Anna, *The Fall of the Royal Government*, xiii, 191-192.

suffered defeat by 1816. The emphasis will be on the chaotic nature of the insurgent threat, the royalist initiatives produced to counter that threat, their defects, and the resilience of insurgency.

Both Brian Hamnett and Christon Archer have taken up the task of combating the "lull thesis" that has formed an integral part of the traditional historiography of the period. Comparing the two historians, Hamnett has been less equivocal on the subject than Archer. Following the traditional pattern, Hamnett argued that by 1816 the insurgency had degenerated into a proliferation of marauding bands that had no hope of achieving a political victory. Despite the political weakness of the insurgents, Hamnett asserted that "rebel bands remained highly dangerous right until 1820-21." However, Hamnett is unclear on what he means by dangerous and concludes simply that by 1820 the war had become a stalemate.<sup>18</sup> Despite its longevity, the insurgency remained a secondary element in the final realization of independence. Hamnett suggests that, with the atomization of insurgency after 1816, the political initiative passed into the hands of the traditional elites drawn from the Church hierarchy, preeminent merchants, viceregal administrators, and landowners. Assigning the determining role to elite interests, Hamnett nevertheless concludes that their ability to act upon their interests was limited by their capacity to control and direct royalist military officers and other *caciques* who had accumulated considerable military power over the course of the war.<sup>19</sup>

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<sup>18</sup> Hamnett, *Roots of Insurgency*, 208-210.

<sup>19</sup> Ibid.; Brian Hamnett, "Mexico's Royalist Coalition: The Response to Revolution 1808-1821," Journal of Latin American Studies 12 (1980): 74-81.



Where Hamnett placed emphasis on the resurgence of elite political interests, Archer stressed the dynamic influence of the continued presence of insurgency after 1816. In Archer's view, no lull developed and that, in the context of insurgency, distinctly new military interests assumed the determining role in society.<sup>20</sup> Incorporating elements from both Hamnett and Archer, the final chapter will assess the significance of the survival of the insurgency after 1816. Its primary purpose will be to determine how the war fostered the emergence of a new elite group in society and to demonstrate that independence was the first expression of both the will and ability of the military to determine the affairs of the emerging nation.

A wide array of source materials have been used in the preparation of this thesis. Document collections compiled by Genaro García and Juan Hernández y Dávalos provided excellent materials covering the period from 1810 to 1816.<sup>21</sup> The documents available in these collections were supplemented by the correspondence of Viceroy Félix Calleja obtained from the microfilm holdings of the

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<sup>20</sup> Christon Archer, "La Causa Buena: The Counterinsurgency Army of New Spain and the Ten Years' War." In *The Independence of Mexico and the Creation of a New Nation*, ed., Jaime E. Rodríguez O., 85-108 (Los Angeles: UCLA Latin American Center Publications, 1989), 102-104.

<sup>21</sup> *Documentos Históricos Mexicanos: Obra Conmemorativa del Primer Centenario de la Independencia de Mexico*. 6 vols.. Edited and comp., by Genaro García (México, 1910. Reprint. Nendeln, Lichtenstein: Krause Reprint, 1971); *Colección de Documentos para la Historia de la Guerra de Independencia de Mexico de 1808 á 1821*. 6 vols.. Edited and comp., by J. E. Hernandez y Dávalos. (México: José María Sandoval Impresor, 1878), Microfiche.

Nettie Lee Benson Library at the University of Texas.<sup>22</sup> For the period after 1816, the correspondence of Viceroy Juan Ruíz de Apodaca proved invaluable.<sup>23</sup> Apodaca's clear and meticulous descriptions of the state of the war provided numerous insights into the application of royalist military policies during the closing stages of the conflict.

When making use of the above mentioned materials, a degree of caution had to be observed. The documents compiled by García and Hernández y Dávalos overwhelmingly reflected the royalist perspective of the war. The biases encountered in these documents tended to be rather straight forward and a suitable amount of care sufficed to separate them from the otherwise accurate and insightful information which they contained. The works of Carlos María de Bustamante, a contemporary rebel partisan, served as an effective counterweight to the preponderance of materials supporting the royalist perspective.<sup>24</sup> The documents collected by Ernesto Lemoine Villacaña on the campaigns of Morelos fulfilled much the same function.<sup>25</sup> Similarly, when dealing with the correspondence of the viceroys, the danger always exists of taking for granted the

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<sup>22</sup> Archivo General de la Nación México (Hereafter AGN): ramo Virreyes, series 1, volume 168-A.

<sup>23</sup> AGN: ramo Historia, volume 152.

<sup>24</sup> Carlos María de Bustamante, *Cuadro histórico de la revolución Mexicana iniciada el 15 de septiembre de 1810 por el cura Miguel Hidalgo y Costilla*. 3 vols. (México, 1961). Esta edición corresponde al texto de la obra impresa por acuerdo de la Camara de Diputados de Congreso de la Union, en 1926.

<sup>25</sup> Ernesto Lemoine Villicaña, et al., *Morelos, su vida revolucionaria á través de sus escritos y de otros testimonios de la época*. Publicaciones de la Coordinación de Humanidades (México: Universidad Nacional Autónoma de México, 1965).

assertions of these powerful colonial officials who were guided by their own political agendas. It should be pointed out that to emphasize the success of their own policies, both Calleja and Apodaca consistently underrated the strength of the insurgency in their correspondence with the Spanish Minister of War. Unavoidable limitations, in terms of access to primary documents, prevented a closer examination of the report supplied by the lower level insurgent and royalist army commanders. However, the growing body of secondary studies based on such documents as these did much to compensate for this deficiency.

## Chapter One:

### The Hidalgo Phase: Creole Insurrection and Popular Rebellion

The creoles who originated the Mexican independence movement began to recede into obscurity after the pyrrhic victory and subsequent insurgent retreat from the battlefield at el Monte de las Cruces which was fought on October 30, 1810, on the westward approach to Mexico City. Father Miguel Hidalgo y Costilla and his lieutenants rose from provincial anonymity to command the most explosive and destructive insurrection in the history of New Spain. Described as unfit "incompetents" by Mexican historian José María Luis Mora, Hidalgo and his creole cohorts inexplicably survived the collapse of their ill prepared conspiracy designed to rid the realm of *gachupín* rule and to achieve Mexican independence.<sup>1</sup> After evading capture by the viceregal authorities, they went on to marshal a force of tens of thousands recruited mostly from the discontented poor of the Mexican Bajío and adjacent areas.

A number of techniques were employed to mobilize the latent power of the poor. Hidalgo, in his 'Grito de Dolores' issued on the morning of 16 September, 1810, enunciated calculated patriotic, religious and emotional appeals to incite the desperate campesinos of the Bajío against the hated European Spaniards. Spontaneous popular

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<sup>1</sup> José María Luis Mora, *México y sus Revoluciones*, ed. Agustín Yañez, Colección de Escritores Mexicanos, 3rd ed., 3 vols. (México: Editorial Porrúa, S.A., 1977), vol. 3, p. 18. Gachupín was a derogatory term commonly used by American born Spaniards, Indians, and castas to refer to European born Spaniards living in New Spain.

attacks against the gachupines and the physical symbols of their authority strengthened the impact of Hidalgo's rhetorical appeals. The lure of pillage, however, proved to be Hidalgo's most effective tool in mobilizing mass support. In combination these factors generated so great a popular response that within six short weeks Hidalgo, Ignacio Allende, Juan de Aldama, and their mass army swept up to the gates of the viceregal capital itself, threatening to destroy both Mexico City and Spanish power in New Spain.

Beyond Hidalgo's direct line of advance, commissioned agents propagated the insurrection outwards to the diverse regions of New Spain. These agents emulated the methods developed by Hidalgo. Individual agents, local *cabecillas*, occupied intermediate positions in society and composed an informal infrastructure which "existed parallel [to] the official regime of subdelegados and local representatives of viceregal and church power."<sup>2</sup> As the revolt gained momentum, Hidalgo's emissaries acted as "linking agents" who bridged the gap separating the elite creole leadership from the faceless Indian and mestizo masses that powered the insurrection.<sup>3</sup> Regional representatives such as José Morelos, José Antonio Torres, José Mercado, and Rafael Iriarte used their connections with the lower classes to great effect to propel the insurrection throughout

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<sup>2</sup> Christon Archer, "Where Did All the Royalists Go? New Light on the Military Collapse of New Spain," ed., Jaime E. Rodríguez O., *The Mexican and Mexican-American Experience in the Nineteenth Century* (Tempe, Ariz.: Bilingual Press, 1989), 25.

<sup>3</sup> Christon Archer, "History of the Independence of Mexico: Views and Interpretations of 1810-1821 Since Oaxtepec, 1969," *Historiographía de la Independencia* (México: Simposio de Historiografía Mexicanista, forthcoming 1990), 7.

much of the colony. At first, the royalist authorities lacked the resources necessary to respond effectively to the combined threat of Hidalgo and his regional cabecillas. Success for the enterprise was a heady prospect during the early weeks and, as resistance melted away before the advancing rebel forces, Hidalgo believed that he and his fellow creoles would soon hold the reigns of power in Mexico.

Despite its early successes, the insurrection spawned false hopes. The rebel leadership that survived the collapse of the first conspiracy exercised little real control over the movement that they created. In the provinces, individual cabecillas acted according to their own dictates based on the strength of the forces that they commanded. Having successfully mobilized the rural and urban masses of the northern provinces, the central leadership failed to develop a mechanism which could guarantee the commitment of their followers. In short, the original creole insurrection became a massive popular insurgency driven by a diverse range of interests over which Hidalgo and his fellow creoles had almost no control.

Hidalgo provided the spark that let loose a torrent of destruction which eventually culminated in the independence of New Spain. The outpouring of violence stemmed from the progressive deterioration, after 1750, in the basic conditions of life both in the countryside and in the larger towns of the Bajío. Dramatic population growth was at the root of this decline. David Brading calculated that the population of the intendancy of Guanajuato, situated completely within the Bajío region, increased by 155 per cent between 1742 and

1793.<sup>4</sup> Growth in other regions both inside and beyond the boundaries of the Bajío, though less than in Guanajuato, recorded similar consistent gains. Overall growth, moreover, reflected itself in the rapid expansion of urban populations.<sup>5</sup>

The physical growth of the Bajío and northern cities, whether related to the expansion of the mining or textile industries - both very significant developments - produced a tremendous expansion in urban demand for raw materials and foodstuffs.<sup>6</sup> The lure of expanding markets induced many *hacendados* (large landowners) to convert their most fertile holdings to wheat production from the maize staple which fed the bulk of the poor. Labor demands in such areas dropped and growing numbers of rural campesinos (mestizos, other castas, and Indians) were forced to subsist on more marginal lands. However, these areas also became the object of the hacendado's entrepreneurial program; here, land owners engaged the campesinos as share croppers or otherwise ensnared them in one of

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<sup>4</sup> David Brading, *Miners and Merchants in Bourbon Mexico 1763-1810* (Cambridge: Cambridge University Press, 1971), 224.

<sup>5</sup> For the growth of Guadalajara, for example, see Eric Van Young, *Hacienda and Market in Eighteenth-Century Mexico: The Rural Economy of the Guadalajara Region, 1675-1820* (Berkeley: University of California Press, 1981), 28-36. For a discussion of urban populations in the Bajío, see: Brading, *Miners and Merchants*, 225-227.

<sup>6</sup> On mining and textiles in the Bajío, see: Brading, *Miners and Merchants*, 156-158, 231-233. Urban markets as far away as Guadalajara drew upon the produce of the fertile Bajío. In 1779, the Bajío supplied 10 per cent of the Guadalajara market for wheat and flour. This figure increased to a peak of 30 per cent in 1791 and leveled off to a range between 20 and 25 per cent at the turn of the century. See, Van Young, *Hacienda and Market*, 63-64.



several profitable land strategies employed to increase estate revenues from these previously underexploited lands.<sup>7</sup>

As Eric Van Young has pointed out, this process was one key component in the commercialization of agriculture in New Spain during the latter half of the eighteenth century. Its corollary was the ongoing marginalization of the rural poor.<sup>8</sup> Forced to secure subsistence in competition with an expanding population from a diminishing percentage of the land and without adequate recourse to employment in the wage labor sector due to widespread underemployment, the rural poor had to endure unacceptable living conditions.<sup>9</sup>

The situation deteriorated even further with the onset of the dearth of 1808-1810. Two successive crop failures brought on first by drought and then by frost uprooted populations in many regions. Prices for all agricultural goods, but particularly maize, rose steadily.

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<sup>7</sup> For the marginalization of staple crop production in the Bajío onto poorer quality lands and the increasing significance of share cropping as a land tenure strategy in these areas, see John Tutino, *From Insurrection to Revolution in Mexico, Social Bases of Agrarian Violence, 1750-1940* (Princeton: Princeton University Press, 1986), 64-65, 89.

<sup>8</sup> The commercialization of agriculture as a process and its effects on the rural population are well developed in Van Young, *Hacienda and Market*, 58, 64-67, 78. Van Young also discusses the increasing prosperity among the more competent, entrepreneurial hacendados who engaged in a diverse range of economic activities integrating, in some cases, land owning with commerce and mining. Such strategies of integrated economic activity made the late eighteenth century a time of great prosperity for the economic elites of New Spain. Ironically, while segments of the colonial élite enjoyed unheard of prosperity, the rural and urban poor endured unprecedented conditions of hardship, *ibid.*, 118. For a more thorough examination of elite business strategies, see John E. Kicza, *Colonial Entrepreneurs: Families and Business in Bourbon Mexico City* (Albuquerque: University of New Mexico Press, 1983).

<sup>9</sup> Tutino, *From Insurrection to Revolution*, 90.

The scarcity of food and the near complete absence of effective organized relief services forced entire families to wander in search of food.<sup>10</sup>

The growing vagabond population in the north threatened to disrupt the stability of the colony. Increased criminality in the urban centers and widespread banditry in the countryside forced government authorities to strengthen urban militias as a precautionary measure to maintain order. Enthusiasm for service in these militias, however, lagged and morale within units became a chronic concern.<sup>11</sup> Nevertheless, the viceregal authorities managed to keep the cities of the realm in hand with an expanding if ill organized security apparatus. However, the deteriorating situation in the countryside passed beyond the control of the crown.<sup>12</sup>

Urban workers unable to secure employment in the mines or the textile workshops in such cities as Guanajuato, San Miguel and Querétaro swelled the ranks of the Bajío's vagabond population

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<sup>10</sup> For a general discussion of the 1808-1818 dearth, see: Brian Hamnett, *Roots of Insurgency: Mexican Regions, 1750-1824* (Cambridge: Cambridge University Press, 1986), 102-124.

<sup>11</sup> William B. Taylor indicated that "individual Indians were chipped away from their communities by population pressure, land shortages and local disputes." Such person easily made the transition to a life of crime. However, in addition to marginalized individuals, Taylor also found that entire villages collectively engaged in banditry along the roads and trails near their homes in order to supplement their subsistence activities. William B. Taylor, "Bandits in late Colonial Times: Rural Jalisco, Mexico, 1794-1821," *Bibliotheca Americana* 1 (2): 39. According to Christon Archer, the militias formed to combat the disruptions caused by such individuals and groups were recruited from the urban artisan, trade, and laboring classes. Popular opposition to mobilization and recruitment was a recurring phenomenon in late 18th century New Spain. Christon Archer, *The Army in Bourbon Mexico, 1760-1810* (Albuquerque: University of New Mexico Press, 1977), 236-240.

<sup>12</sup> Hamnett, *Roots of Insurgency*, 55.

adding to the unrest in the countryside.<sup>13</sup> The dearth increased production costs to levels which surpassed the resources available to mine owners. Livestock herds in the northern Bajío that supplied the meat component of the mine worker's diet shrank throughout the years of dearth compounding the crisis generated by rising grain and maize prices. Escalating feed prices further inflated the costs being born by mine owners; the large mule teams used in the extraction and supply processes became impossible to maintain. As a result, 30 per cent of the mining operations at Guanajuato shut down.<sup>14</sup> By 1810, the situation of the miners had become acute. A report submitted by the Cabildo (town council) of Guanajuato to Intendant José Antonio Riaño on 22 September, 1810, declared that mine workers:

suffered all the effects of the hunger and sickness of this calamitous year. They, who pour out their lives in streams of sweat, were the first to find their efforts rendered fruitless by the extreme decadence at which the mines have arrived.<sup>15</sup>

Similarly, the owners of textile shops located primarily in Querétaro and San Miguel were unable to meet rising wool prices. The expansion of wheat production in the prime lands of the Bajío

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<sup>13</sup> Torcuato S. Di Tello, "The Dangerous Classes in Early Nineteenth Century Mexico," Journal of Latin American Studies 5:1 (1973): 90-91. Di Tello emphasized the origins of the revolt in the Querétaro and San Miguel region, noting especially the impact of unemployment and the consequent levels of discontent.

<sup>14</sup> Tutino, *From Insurrection to Revolution*, 97.

<sup>15</sup> Quoted in Brading, *Miners and Merchants*, 342

and the relegation of maize growing into more peripheral areas forced stock raisers and herders to seek pastures further to the north. During the years of dearth, the scarcity of feed and the desiccated state of the countryside rendered effective transportation nearly impossible. The price of what little wool did manage to reach the urban markets of the Bajío rose dramatically pushing the costs of production to an unbearable level. After 1808, the renewed importation of British textiles caused by the disruption of Spanish commerce compounded the existing domestic crisis. Dislocated miners, textile workers, and rural producers created a highly mobile pool that provided the bulk of the manpower for Hidalgo's army.<sup>16</sup>

Often Hidalgo appears in Mexican historiography as "the Scourge of Tyrants, the Friend of the Oppressed and the Man of Mexico."<sup>17</sup> His status as the father of Mexican independence and the first hero of the nation derives from the laudatory historical works of early Mexican nationalists. Carlos María de Bustamante, writing in the immediate aftermath of independence, hailed Hidalgo as the magnanimous leader of the people - a man whose heart was completely incapable of "remaining indifferent to the sighs emanating from the souls of miserable [poor] that suffered in conditions of the most oppressed nakedness."<sup>18</sup> Succeeding generations of Mexican nationalist historians carried on the tradition

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<sup>16</sup> Tutino, *From Insurrection to Revolution*, 91-93.

<sup>17</sup> Lesley Byrd Simpson, *Many Mexicos* (Berkeley: University of California Press, 1966), 209.

<sup>18</sup> Carlos María de Bustamante, *Cuadro histórico de la revolución Mexicana*, 3 vols. (México, 1961) vol. 1, p. 24.

begun by Bustamante through the Reforma, the Porfiriato, and up to the present day.<sup>19</sup> Hidalgo's "lofty and noble spirit" expressed itself in the agricultural experiments and industrial enterprises that he developed at Dolores to succor the hard lives of his parishioners.<sup>20</sup> Relegated to this backwater by a disapproving society blind to his full talents, Hidalgo naturally befriended the people. Together they worked as allies to better their standard of living.<sup>21</sup> According to this idealized interpretation, Hidalgo launched the war for independence to right the wrongs present in society and to free the people from the squalor in which they lived.

Others historians have been less generous to Hidalgo. José María Luis Mora characterized Hidalgo as a prime example of creole mediocrity. The cura lacked a generous heart and was preoccupied with bringing his own plans to fruition. In Mora's view, Hidalgo was embittered by his assignment to Dolores.<sup>22</sup> He did not so much identify with his poor neighbors as ponder the injustice of a society that penalized him because of his creole birth. As Lesley Simpson asserted, Hidalgo blamed the Spaniards who dominated the uppermost positions in New Spain for his provincial obscurity.<sup>23</sup>

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<sup>19</sup> Archer, "History of the Independence of Mexico," 1.

<sup>20</sup> Vicente Riva Palacío, *México a través de los siglos*, 5 vols. (México, D.F.: Editorial Cumbre, S.A., 1967), vol. 3, pp. 89-91.

<sup>21</sup> Roberto Blanco Moheno, *Historia de dos curas revolucionarios: Hidalgo y Morelos* (Mexico: Editorial Diana, 1973), 20-22.

<sup>22</sup> Mora, *México y sus Revoluciones* 3:21.

<sup>23</sup> Simpson, *Many Mexicos*, 209.

Where others argued that Hidalgo cultivated economic projects in Dolores to relieve the condition of the poor, such endeavors might also be viewed as an attempt to add to his own wealth and status in society.<sup>24</sup>

To Lucas Alamán, Hidalgo's insurrection - far from representing the concerns of the common people - embodied nothing more than a linear continuation of former creole efforts to disassociate themselves from the power of Spain and to establish their own rule. In effect, conspiracy and insurrection revived the hopes extinguished by the gachupín coup that unseated Viceroy José de Iturigaray in September 1808.<sup>25</sup> Alamán contended that the creoles unabashedly pursued independence in 1808 and that in 1810 these same creole agitators plotted to mobilize "diverse groups" in the population as the means to achieve their own exclusive ends.<sup>26</sup>

More recently, historians such as Hugh Hamill have attempted to reconcile Hidalgo's apparent populist tendencies with his other,

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<sup>24</sup> Hugh Hamill argues that Hidalgo lacked the "spiritual calling" of a "devout and dedicated clergyman" and that he looked upon the priesthood a personal "sinecure." See, Hugh Hamill, *The Hidalgo Revolt: Prelude to Mexican Independence* (Gainesville: University of Florida Press, 1966), 87.

<sup>25</sup> Lucas Alamán, *Historia de Méjico*, 2d ed., 5 vols. (México: Editorial Jul, S.A., 1968), vol. 1, p. 248. The activities of the creoles in the Mexico City through the summer of 1808 have more recently been looked upon as an attempt to widen the parameters of "power-sharing" or a move towards increased autonomy and not a bid to secure outright independence from Spain. This development was peculiar to the struggle as it developed after 1810 and Hidalgo's Grito. For "power-sharing," see Brian Hamnett, "Mexico's Royalist Coalition: The Response to Revolution 1808-1821" *Journal of Latin American Studies* 12, p. 61. For "autonomy," see Colin M. MacLachlan and Jaime E. Rodríguez O. *The Forging of the Cosmic Race: A Reinterpretation of Colonial Mexico* (Berkeley: University of California Press, 1980), 301-308.

<sup>26</sup> Alamán, *Historia de Méjico* 1: 243.

more self-seeking characteristics. However, Hamill failed to resolve the matter. Despite his extensive study of the 1810 revolt, Hamill conceded only that Hidalgo's character possessed an enigmatic duality. On the one hand, he was a "leader of a criollo revolution to overthrow Spanish rule" and, on the other, a "chief of a peasant revolt to obtain property and privileges for the lower classes."<sup>27</sup>

Despite the continuing confusion among historians over Hidalgo's sympathies, the conspiracy that he presided over was strictly a creole plot to remove the gachupines from power. Creole captains Ignacio Allende and Juan de Aldama of San Miguel, two of the original conspirators, began their activities in the hinterland of Querétaro and Guanajuato in the winter of 1809. Their machinations were a continuation of the creole conspiratorial tradition which had last manifested itself in a plot centered in the city of Valladolid in the summer of 1809.<sup>28</sup> Allende and Aldama travelled widely making visits to all the principal centers of the immediate area, including Hidalgo's parish at Dolores. Their goal was to spread sedition and anti-gachupín attitudes among the creoles of the "provincial bourgeoisie."<sup>29</sup> Fully aware of their activities, Hidalgo joined the conspiracy much later during the summer of 1810.<sup>30</sup>

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<sup>27</sup> Hamill, *Hidalgo Revolt*, 54.

<sup>28</sup> Bustamante, *Cuadro histórico* 1: 18-23.

<sup>29</sup> Denuncia anónima contra D. Ignacio de Allende y D. Juan Aldama remitida de S. Miguel, septiembre 9 de 1810, *Colección de Documentos para la Historia de la Guerra de Independencia de México de 1808 a 1821*, 6 vols., ed., and comp., J. E. Hernández y Dávalos (México: José María Sandoval Impresor, 1878), vol. 2, no. 25, pp. 63-64. Brian Hamnett defined the provincial bourgeoisie as regionally oriented lawyers, clerics, doctors. They were almost exclusively urban and were secondary or "junior" members of the social circle of Mexico's "resident elite." This latter group included landowners, mine owners, and



The scope of the conspiracy expanded throughout the summer of 1810. Taking advantage of creole fears, or perhaps acting upon the basis of their own genuine concerns, the conspirators sought to galvanize creole support by transmitting rumors of gachupín treachery. The European Spaniards, they claimed, plotted to hand over the realm either to the godless French or the heretical English.<sup>31</sup> In their travels the conspirators made use of an informal network of interpersonal relationships that loosely united provincial creoles around family relationships, economic associations, and political debts.<sup>32</sup> On the basis of these connections, a conspiratorial circle emerged in Querétaro under the guise of a fictitious academic society.<sup>33</sup> The conspirators intended to convene similar secret juntas in all major Mexican cities. From these points, a simultaneous

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merchants - that is, the wealthiest and most powerful creoles and European Spaniards in society. Hamnett, *Roots of Insurgency*, 19-24; Hamnett, "Mexico's Royalist Coalition: The Response to Revolution, 1808-1821," Journal of Latin American Studies 12 (1980): 55-56.

<sup>30</sup> Declaración del Cura Hidalgo, Chihuahua, 7 de mayo de 1811, *Colección de Documentos*, vol. 1, no. 2, p. 9.

<sup>31</sup> Christon Archer has discussed such rumors as they relate to the plot of Valladolid. See, *The Army in Bourbon Mexico*, 292-93. Michelina's testimony in addition to that of Allende reveal the degree to which disaffected creoles were influenced by anti-gachupín rumors. See Verdadero Origen de la Revolución de 1809 en el Departamento de Michoacán, *Documentos Históricos Mexicanos*, 6 vols., ed., and comp., Genaro García, (Mexico, 1910; reprint, Nendeln, Liechtenstein: Krause Reprint, 1971), vol. 1, pp. 467-471; Causa Instruída Contra el Generalísimo D. Ignacio de Allende, Chihuahua, 10 de mayo - 29 de junio de 1811, *Documentos Históricos*, vol. 6, pp. 2-85.

<sup>32</sup> Eric R. Wolf and Edward C. Hansen, "Caudillo Politics : A Structural Analysis." Comparative Studies in Society and History 9 (1967): 171-172.

<sup>33</sup> Extracto de los avisos dados desde la ciudad de Querétaro, sobre un proyecto de sublevación en Dolores (sin fecha), *Colección de Documentos*, vol. 2, no. 29, p. 69.

uprising would destroy the power of the gachupines.<sup>34</sup> With the Spanish minority ousted from power, the creoles could then assume the most sought after offices that would grant them power, prestige, and wealth.<sup>35</sup> At no time did the conspirators directly address the needs and concerns of the poor.<sup>36</sup>

In the pursuit of this plan, Hidalgo and Allende recognized the need to gain the support of the local militia forces. They wooed creole officers with promises of important positions. In Querétaro, Hidalgo and Allende organized dances and other social functions in order to conceal their recruitment activities from the viceregal authorities.<sup>37</sup> Once the loyalty of the officers had been secured, they passed on the message of revolt to their soldiers. By the beginning of September, the conspirators claimed to have secured the backing of troops from the militia regiments raised at San Miguel, Celaya, Querétaro, and Guanajuato.<sup>38</sup> To supplement the militia forces organized in support of the plan, the conspirators contacted local hacendados and

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<sup>34</sup> Castillo Ledon, *Hidalgo, La vida del heroe*, 2 vols., (México: Cámara de Diputados, 1972), vol. 1, p. 142.

<sup>35</sup> Tutino, *From Insurrection to Revolution*, 101-109.

<sup>36</sup> At Guadalajara in December of 1810, Hidalgo abolished tribute and slavery. Yet, in light of his need to raise an army to meet the advance of Calleja and Flon, this smacks of an attempt to buy popular support and not a genuine impulse towards reform. See, Bando de Hidalgo aboliendo la esclavitud, Guadalajara, 29 de noviembre de 1810, *Colección de Documentos*, vol. 2. no. 145, pp. 243-244.

<sup>37</sup> Extracto de los avisos, *Colección de Documentos*, vol. 2, no. 29, p. 68-69.

<sup>38</sup> One report claimed that troops had been secured from the regiments at San Miguel and Guanajuato. See, *ibid.* vol. 2, no. 29, p. 69. Hidalgo's own testimony claimed support from troops located at Celaya and Querétaro. See, *Declaración del Cura Hidalgo*, *ibid.* vol. 1, no. 2, p. 9.

*mayordomos* (hacienda managers) to mobilize estate dependents in areas adjacent to the principal urban centers of the northern Bajío.<sup>39</sup>

Hoping to guarantee their victory, the creole leaders formulated more extensive plans to rely on mass mobilization. Allende proposed that the uprising be timed to take advantage of the annual fair at San Juan de los Lagos held to the west of Guanajuato during the first two weeks of December. He suggested that the large number of Indians and castas expected to assemble at this event - upwards of 35,000 - represented a ready made army that could easily be won over to the creole cause.<sup>40</sup> However, other creoles participating in the plot did not relish the prospect of a massive popular revolt. Chronic fear of Indian rebellion and caste war resided just below the surface of the collective creole consciousness.<sup>41</sup> Not surprisingly, once the conspirators became confident of their ability to secure sufficient arms and manpower to carry through their designs without mobilizing the rural masses, they dropped the San Juan de los Lagos plan.<sup>42</sup>

The conspirators attained some degree of success in organizing the Querétaro region. Allende claimed that as many as 1,800

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<sup>39</sup> D. Juan Ochoa al Virrey Venegas, Querétaro 11 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 28, p. 66.

<sup>40</sup> Hamill, *Hidalgo Revolt*, 113-114.

<sup>41</sup> Eric Van Young, "Millennium on the Northern Marches: The Mad Messiah of Durango and Popular Rebellion in Mexico, 1800-1815." Comparative Studies in Society and History 28:3 (1986): 387-388, 400.

<sup>42</sup> Hamill, *Hidalgo Revolt*, 116.

supporters had been recruited in Querétaro alone.<sup>43</sup> According to Hidalgo, one figure enlisted by Allende in Querétaro, Epigmenio González, personally gained the support of some two hundred persons from the city's poorer classes.<sup>44</sup> Don Epigmenio, a local grocer, attracted such backing based on his personal contacts with the poor and his control over credit vital to the daily existence of the disadvantaged classes.<sup>45</sup> Such persons became increasingly important to the rebel leaders as the conspiracy moved into actual rebellion.

In the countryside, the conspirators secured the support hacienda residents located near the towns of San Felipe, San Miguel, and Querétaro.<sup>46</sup> At the hacienda "de Brabo," situated six *leguas* (one legua = 4.2 km) distant from Querétaro, 150 or more *rancheros* expressed their willingness to support Hidalgo's cause.<sup>47</sup> The rentiers of this hacienda, along with most other rural dependents, strove continually over long years to gain "independent control of the lands

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<sup>43</sup> Causa Instruída Contra el Generalísimo D. Ignacio de Allende, 10 de mayo - 20 de junio, Chihuahua, de 1811, *Documentos Históricos*, vol. 6, p. 6.

<sup>44</sup> Declaración del Cura Hidalgo, Chihuahua, 7 de mayo de 1811, *Colección de Documentos*, vol. 1, no. 2, p. 9.

<sup>45</sup> Hamill, *Hidalgo Revolt*, 106. For a discussion of credit in the daily lives of the poor in Mexico City during the later colonial period, see John E. Kicza, *Colonial Entrepreneurs: Families and Business in Bourbon Mexico City* (Albuquerque: University of New Mexico Press, 1983), 192.

<sup>46</sup> D. Juan Alonso á Juan de Noriega, Querétaro, 11 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 27, p. 66.

<sup>47</sup> Manuel Carrera Stampa, "The Evolution of Weights and Measures in New Spain," *Hispanic American Historical Review* 29 (1949): 10; D. Juan Ochoa á Venegas, Querétaro, 11 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 28, p. 68.

they cultivated and political autonomy in local affairs."<sup>48</sup> Referring to the Rancho de Bravo, located near San Felipe, Brian Hamnett argued that issues of land use, water rights, and insulting abuse by landowners "could well have fuelled insurgent support."<sup>49</sup> Hidalgo, in any case, had Dolores and its dependents well in hand and, on the direction of the cura during the months preceding the insurrection, local residents obediently prepared a store of weapons.<sup>50</sup> Encouraged by the success of these preparations, the conspirators set the date of the uprising for October 2, 1810.

However, even as Hidalgo and his associates finalized their plans, a series of denunciations brought the conspiracy to the attention of the viceregal authorities. First, the conspirator José Maríano Galván confessed to participating in subversive activities in Querétaro during early August, 1810. Apparently discounting the seriousness of the report, Audiencia Judge Guillermo Aguirre did not act upon the information.<sup>51</sup> Once the summer passed, however, an anonymous denunciation dated 9 September identified Allende and Aldama as the principal motors of the plot.<sup>52</sup> Several subsequent reports identified Hidalgo as another key leader of the group. In an

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<sup>48</sup> Tutino, *From Insurrection to Revolution*, 83.

<sup>49</sup> Hamnett, *Roots of Insurgency*, 92-93.

<sup>50</sup> Memoria del último de los primeros soldados de la independencia, Pedro José Soletto, *Colección de Documentos*, vol. 2, no. 178, p. 322.

<sup>51</sup> Hamill, *Hidalgo Revolt*, 117.

<sup>52</sup> Denuncia anónima, San Miguel, 9 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 25, pp. 63-64.

atmosphere of growing concern, the *alcalde mayor* (district magistrate) of Querétaro, Juan Ochoa, moved to gather additional information. His investigations produced an extensive list of conspirators and sympathizers in towns throughout the Bajío.<sup>53</sup>

Hamill has suggested that Intendant Riaño reacted slowly to the activities of the dissident creoles since many of the conspirators, including Hidalgo, were members of his own immediate circle of friends and associates.<sup>54</sup> Notwithstanding these connections among the educated provincial elite, Riaño clearly did not sympathize with the planned insurrection and promptly ordered the detention of those suspected of complicity in the plot. Understandably, most arrests took place in Querétaro, the center of creole subversion. Outside of Querétaro in the other primary towns and cities of the north where the Hidalgo group had created only a rudimentary support structure, the numbers of arrests diminished considerably.<sup>55</sup> Although most other creole conspirators in Querétaro region were taken into custody, Hidalgo, Allende, and Aldama escaped capture.<sup>56</sup>

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<sup>53</sup> Ochoa al Real Audiencia Gobernadora, Querétaro, 10 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 26, pp. 64-65; Juan Alonso á Juan de Noriega, Querétaro, 11 de septiembre de 1810, *ibid.* vol. 2, no. 27, pp. 65-66; Ochoa á Venegas, Querétaro, 11 de septiembre de 1810, *ibid.* vol. 2, no. 28, pp. 66-68.

<sup>54</sup> Hamill, *Hidalgo Revolt*, 118.

<sup>55</sup> The confidence of Captain Arias in Querétaro was so low that, supposing the authorities to have uncovered all conspirators of any importance, he confessed his involvement in the plot even before the authorities had known its full extent. For this interpretation, see Hamill, *Hidalgo Revolt*, 118.

<sup>56</sup> Alamán, *Historia de Méjico* 1: 235-238.

The limited connections which the conspirators had developed outside of Querétaro were based on ambiguous promises and commitments. In Mexico City, for example, one report vaguely linked the son of the magistrate of the city jail to the conspiracy.<sup>57</sup> In Guanajuato, Hidalgo secured a weak commitment from Juan Garrido, the drummer in the local militia battalion. Along with Garrido, two sergeants of the Guanajuato battalion also pledged to lend their aid to Hidalgo's cause. When Garrido learned of the failure of the plot in Querétaro, he turned against the plan.<sup>58</sup> Hoping to clear his name, Garrido approached Intendant Riaño and denounced his two companions. Seizing all three, Riaño also recovered seventy pesos that had been given to the Guanajuato conspirators to bribe the local troops.<sup>59</sup> With these arrests, the Querétaro conspiracy was brought almost to the point of total collapse.

According to Mora's account of the collapse of the conspiracy, Allende, travelling from his home in San Miguel to visit Hidalgo at Dolores, fortuitously intercepted the orders for his arrest. This stroke of luck, Mora asserted, saved the "revolution from dying in the cradle."<sup>60</sup> In light of his discovery, Allende determined to push on to Dolores in order to consult with Hidalgo. He arrived on the night of 15 September. Appraised of the situation by Allende, Hidalgo was

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<sup>57</sup> Extracto de los avisos, *Colección de Documentos*, vol. 2, no. 29, p. 70.

<sup>58</sup> Hamill, *Hidalgo Revolt*, 118.

<sup>59</sup> Alamán, *Historia de Méjico* 1: 232-233; and Mora, *México y sus Revoluciones* 3: 29.

<sup>60</sup> Mora, *México y sus Revoluciones* 3: 30.



said to have reacted coolly without showing any surprise or fear. In Mora's view, Hidalgo displayed great personal courage in urging his comrades to act immediately in order to save the "revolution." Despite the damage to their plans and the lack of any trained troops close at hand, Hidalgo insisted that they must nevertheless announce their intentions against gachupín rule.<sup>61</sup>

Mora's account is consistent with the myths which continue to surround Hidalgo. Yet, the untimely demise of the conspiracy must have been a daunting blow. Contradicting Mora's version of these crucial events, Alamán claimed that Allende arrived in Dolores to confer with Hidalgo on the night of 14 September. In his account, the two remained cloistered in Hidalgo's residence for nearly two days without reaching any decision. The arrival of Aldama on the morning of the 16th with news that new warrants had been issued for their arrests prompted Hidalgo and Allende to reach a final decision. Hidalgo, apparently in a state of fatalistic panic, remarked to his friends: "Comrades we are lost, there is no recourse other than to go and take on the gachupines." According to Alamán, desperation followed indecision and these shocks combined to stiffen Hidalgo's personal resolve. Despite the protests of Aldama, Hidalgo prepared his famous Grito.<sup>62</sup>

Hidalgo's Grito de Dolores appealed directly to the aggrieved sensibilities of the common people. Pedro José Soletto, a laborer close to the household of the cura and witness to the events of the early

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<sup>61</sup> Ibid. 29-30.

<sup>62</sup> Alamán, *Historia de Méjico* 1: 240-241.

hours of 16 September, claimed that Hidalgo explicitly rallied popular support around the cause of independence. Soleto reported that cries of "*viva la independencia*" filled the air in response to Hidalgo's call to arms.<sup>63</sup> Quite possibly, this recollection by Soleto, sixty years after the fact, is tainted by the legends surrounding Hidalgo life and deeds. Having lived through the decades during which Mexico established its national myths, it was natural that Soleto selectively affirmed that independence was one of Hidalgo's stated objectives. However, it is more likely that Hidalgo made no specific reference to independence on that first day. As Hugh Hamill suggested:

the concept of independence was not yet introduced for it was feared that the illiterate Indians and castes would only be confused by that abstraction.<sup>64</sup>

In consultation with his comrades, Hidalgo decided that appeals to some "remote good" or "abstract ideas of justice and utility or the necessity of Independence" were not likely to attract popular support.<sup>65</sup>

Needing to mobilize forces quickly, the conspirators capitalized on the considerable anti-gachupín sentiment that existed throughout New Spain. Commenting in a letter to the *Ayuntamiento* (town

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<sup>63</sup> Memoria del último de los primeros soldados de la independencia, Pedro José Soleto, *Colección de Documentos*, vol. 2, no. 178, p. 323.

<sup>64</sup> Hugh Hamill, "Early Psychological Warfare in the Hidalgo Revolt." *Hispanic American Historical Review* 41 (1963): 204.

<sup>65</sup> Mora, *México y sus Revoluciones* 3: 15-16.

council) of Guadalajara five days after Hidalgo issued his Grito, José Simeon de Uría recognized the tactic of the rebels. "Their principal objective," he wrote, "was to inculcate a mortal hatred against the Europeans in the hearts of all."<sup>66</sup>

Most Mexicans needed little prompting and even the slightest inflammatory statement against the gachupines elicited a dramatic response from the hard pressed lower classes. This was clearly the case in the northern city of Zacatecas three months before Hidalgo's Grito. In May, 1810, Fray José María Cos reported the existence of a "terrible ferment against the Europeans." According to Cos, seditious anti-gachupín slogans painted on the city's street corners nearly incited a bloody riot.<sup>67</sup> Armed bands of the local riff-raff, inspired by the subversive graffiti and perhaps incited by outside agitators, took to the streets clamoring for the immediate death of any and all gachupines found within the city.<sup>68</sup> Only the timely intervention of the local clergy saved the lives of resident European Spaniards.<sup>69</sup> Although the disturbance subsequently dissipated, concerns persisted for several months afterwards over the unsettled condition

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<sup>66</sup> D. José Simeon de Uría al Ayuntamiento de Guadalajara, Guadalajara, 21 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 37, p. 81.

<sup>67</sup> Dr. José Maria Cos á Captain D. Juan N. Oviedo, San Cosme, 29 de mayo de 1810, *Colección de Documentos*, vol. 2, no. 17, p. 50.

<sup>68</sup> One observer, commenting on this riot was convinced that the whole incident was the work of French sympathizers. See, El Conde del Penasco á Oviedo, México, 20 de junio 1810, *Colección de Documentos*, vol. 2, no. 19, pp. 54-55.

<sup>69</sup> Dr. José Maria Cos á Oviedo, San Cosme, 29 de mayo de 1810, *Colección de Documentos*, vol. 2, no. 17, p. 50.

of the city's population.<sup>70</sup> Once the insurrection began, similar spontaneous anti-gachupín outbursts became the norm and priests were not always able to intercede on behalf of the chosen victims of the mob.<sup>71</sup>

Hidalgo cultivated violent hatred for the gachupines in conjunction with basic patriotic and religious appeals. He played upon the exaggerated fears produced by the gachupín coup against Viceroy José de Iturigaray in September 1808. Where Hidalgo and his fellow conspirators previously used such rumors to mobilize creole support for the conspiracy, they now employed similar messages to great effect among the less educated classes. Sensitive to the potential impact of gossip, Hidalgo exhorted the residents of Dolores to rise up and resist the "pro-French machinations of the gachupines."<sup>72</sup> Furthermore, Hidalgo invoked the revered authority

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<sup>70</sup> El Conde del Penasco á Oviedo, México, 20 de junio de 1810, *Colección de Documentos*, vol. 2, no. 19, pp. 54-55.

<sup>71</sup> During one incident in 1813, a priest and former rebel commander, José Antonio Talavera, successfully intervened to save the lives of eight "royalists." However, in September, 1810, many priests were in the forefront of the revolt encouraging violent action against the gachupines. Initially, the royal authorities were at odds over how to enforce discipline among the lower clergy. Nancy Farriss indicated that while some royalist officers urged that rebellious priests be shot outright, others during these early stages viewed this type of response as repugnant especially where the details of a given case were unclear. For one example, see the case of Fray Francisco Soría who the viceregal authorities accused of inciting the Indians of his parish to kill three local gachupines. For details of this incident see text below, p. 22. Apodaca al Ministro de Guerra, México, 31 de agosto de 1818, AGN. Virreyes, ser. 2, vol. 56, no. 82, fols. 210-211; Nancy Farriss, *Crown and Clergy, 1579-1821: The Crisis of Ecclesiastical Privilege* (London: The Athlone Press, The University of London, 1968); AGN: Historia, vol. 409, fols. 82-117.

<sup>72</sup> Christon Archer speculated that gossip had a significant impact on the minds of the lower classes during this era, see "History of the Independence of Mexico," 7; Hamill, "Psychological Warfare," 209.

of the deposed king, Ferdinand VII (*el Deseado* - the desired one), to justify the revolt.<sup>73</sup> It was in his name that the poor seized the gachupines. The actual positions and status of the victims mattered little for, according to Eric Van Young, gachupines were universally regarded as the "symbolic" oppressors of the people and the principal authors of "bad government."<sup>74</sup>

In his proclamation to Intendant Riaño at Guanajuato two weeks after the Grito, Hidalgo dropped the pretense of continued loyalty to the king. Demanding the city's surrender, Hidalgo proffered his cause as serving the interests of both Americans and Europeans and that each group would do well to "proclaim independence and the liberty of the nation."<sup>75</sup> Despite Hidalgo's failure to invoke the name of the king, rumors continued to circulate alleging that he in fact applauded the rebellion. According to other rumors, Ferdinand VII actually accompanied Hidalgo's army in a mysterious black coach.<sup>76</sup> Even after Hidalgo gave up that pretense himself, justifying acts of revolutionary violence in the name of the king remained a standard practice among the insurgents.

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<sup>73</sup> For an authoritative account of imprisonment of King Ferdinand VII, see Alamán, *Historia de Méjico* 1: 104-107.

<sup>74</sup> Van Young, "Mad Messiah," 404.

<sup>75</sup> Hidalgo al Intendente Riaño, Guanajuato, 28 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 53, pp. 116-117.

<sup>76</sup> Alamán, *Historia de Méjico* 2: 33-34; Eric Van Young, "Quetzalcóatl, King Ferdinand, and Ignacio Allende Go to the Seashore; or Messianism and Mystical Kingship in Mexico, 1800-1821," ed., Jaime E. Rodríguez O., *The Independence of Mexico and the Creation the New Nation* (Los Angeles: UCLA Latin American Center Publications, 1989), 110.

Hidalgo also made fiery appeals urging the Indians and castas to defend the true Catholic religion. In the decades before the Grito, public sentiment soured against the Spanish government over its 1767 expulsion of the Jesuits from New Spain. This measure proved immensely unpopular and incited a number of major protests. In San Luis Potosí, for example, an enraged mob tried to block the exile of the town's Jesuit fathers.<sup>77</sup> Resentment over the Jesuit debacle was universal and the gachupines were held directly responsible for this treachery.<sup>78</sup> After the coup against Iturigaray, rumors that the gachupines now plotted to deliver up New Spain to the French who had all but destroyed the Catholic faith in their own country created a sense of profound outrage. Similar stories, telling of gachupín plots to turn New Spain over to the British produced the same result. Such perceptions of gachupín perfidy, in one instance in late October, 1810, led the villagers of Xiquipilco in the Toluca Valley to kill three local gachupines. Royal authorities accused the parish priest, Francisco Soría, of fermenting this action. In his own defense, Soría claimed he was present at the scene only to perform burial rites for the unfortunate Spaniards. Moreover, Soría and other friendly witness alleged that the Indians barred the priest from administering even these sacred rites to the undeserving gachupines.<sup>79</sup>

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<sup>77</sup> Farriss, *Crown and Clergy*, 131.

<sup>78</sup> Jacques Lafaye, *Quetzalcóatl and Guadalupe. The Formation of Mexican National Consciousness, 1532-1813* (Chicago: The University of Chicago Press, 1984), 101-102.

<sup>79</sup> AGN: Historia, vol. 409, fols. 82-86.

Hidalgo, himself a man of considerable authoritative and religious appeal, intensified the religious character of the insurrection by demanding action against the European Spaniards in the name of the Virgin of Guadalupe.<sup>80</sup> The Virgin of Guadalupe first appeared in an apparition before an Indian named Juan Diego in 1531. A cult surrounding her image developed to the point where it attained the status a nascent "national myth." Jacques Lafaye has suggested that Hidalgo could have picked no better symbol in his quest to rapidly mobilize popular support.<sup>81</sup> Indeed, as David Brading asserted, "behind [the cult of the Virgin] lay the natural devotion of the masses."<sup>82</sup>

While historians such as Brading and Lafaye agree that the Virgin served as a valuable symbol that won widespread support, some contention exists over when the image of the Virgin was actually first invoked. Soletó recalled that Hidalgo made direct reference to her in his Grito.<sup>83</sup> Hugh Hamill, on the other hand, disagreed and held that chants exalting the Virgin were not taken up

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<sup>80</sup> Eric Van Young unequivocally stated that Hidalgo used the Virgin as a "device" to mobilize popular support. Van Young, "Moving Towards Revolt: Agrarian Origins of the Hidalgo Rebellion in the Guadalajara Region," ed., Friedrich Katz, *Riot, Rebellion, and Revolution: Rural Social Conflict in Mexico* (Princeton: Princeton University Press, 1988), 204 n. 69.

<sup>81</sup> Lafaye, *Quezalcóatl and Guadalupe*, 119.

<sup>82</sup> David Brading, *The Origins of Mexican Nationalism* (Cambridge: Cambridge University Press, 1985), 12.

<sup>83</sup> Memoria del último de los primeros soldados de la independencia, Pedro José Soletó, *Colección de Documentos*, vol. 2, no. 178, pp. 178, 323.

by Hidalgo's followers until later in the first afternoon when they had arrived at Atotonilco en route from Dolores to San Miguel.<sup>84</sup>

The distinction drawn by Hamill is, for the most part, inconsequential. It seems likely that Hidalgo verbally invoked the sacred Mother at the outset and that the physical symbol of the Virgin was subsequently taken up at Atotonilco on the banners around which the Hidalgo's followers rallied. The fidelity of Hidalgo's followers to the Virgin, in any case, was beyond question. As a mark of their loyalty, they sewed badges bearing the image of the Virgin on the caps which they wore into battle.<sup>85</sup> The presence of the Virgin, in the form of the banners and the badges at the forefront of the rebel forces, added significantly to Hidalgo's charismatic appeal. According to Eric Van Young and others, the use of powerful religious symbols such as the Virgin in conjunction with the individual charismatic appeal of Hidalgo gave the revolt a considerable millenarian and messianic fervor.<sup>86</sup>

In order to galvanize popular support, Hidalgo instigated direct action against the gachupines and the physical symbols of their power. The Grito agitated the local population and provided the movement with its rationale. Yet, active steps were imperative to

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<sup>84</sup> Hamill, "Psychological Warfare," 213.

<sup>85</sup> Declaración del Cura Hidalgo, Chihuahua, 7 de mayo de 1811, *Colección de Documentos*, vol. 1, no. 2, pp. 13, 31.

<sup>86</sup> Van Young, "Mad Messiah," 406. William B. Taylor stated that the Virgin was more than a simple symbol of emerging nationalism. She was a potent "representation of the Virgin of the Immaculate Conception . . . an image rich in meaning for the idea that Indian villagers were chosen people." See William B. Taylor, "Banditry and Insurrection: Rural Unrest in Central Jalisco, 1790-1816," ed. Friedrich Katz, *Riot Rebellion, and Revolution*, 233.



overcome the passivity and acceptance of authority for which the lower classes were traditionally noted.<sup>87</sup> In Dolores, Hidalgo declared an end to the tribute owed to the Spanish crown.<sup>88</sup> Following through with his verbal assault on Spanish authority, Hidalgo directed residents to take charge of the local barracks. Simultaneously, Hidalgo's followers apprehended all the local gachupines using the weapons which they had previously prepared. These unfortunates were then taken to the central plaza and deposited in the town jail.<sup>89</sup> Assaults against local jails became widespread during the insurrection. On the one hand, they provided Hidalgo with a ready supply of new recruits from among the liberated criminals. On the other, the capture and destruction of these highly visible symbols of oppressive "bad government" provided the psychological impetus

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<sup>87</sup> William B. Taylor suggested that conflict was the norm rather than the exception in the Mexican countryside during the late colonial period and that the suggestion that the campesino blindly accepted his lot as the will of God was greatly overstated. Despite Taylor's numerous examples, one must concede that conflict normally manifested itself in the form of litigation and that violent outbursts were the exception to this rule. One should not, in any case, be too quick to discount the numerous works which point towards the passivity of the Mexican campesino. William Taylor, *Drinking, Homicide and Rebellion in Colonial Mexican Villages* (Stanford: Stanford University Press, 1979), 114, 131; Eric Van Young, "Conflict and Solidarity in Indian Village Life," Hispanic American Historical Review 64(1): 65 passim; Eric R. Wolf, "Aspects of Group Relations in a Complex Society: Mexico," American Anthropologist 56 (1956).

<sup>88</sup> Colin M. MacLachlan and Jaime E. Rodríguez O., *The Forging of the Cosmic Race: A Reinterpretation of Colonial Mexico* (Berkeley: University of California Press, 1980), 311.

<sup>89</sup> Causa instruída contra el Generalísimo D. Ignacio de Allende, Chihuahua, 10 de mayo - 20 de junio de 1811, *Documentos Históricos Mexicanos*, vol. 6, pp. 4-7.

needed to move populations into rebellion.<sup>90</sup> The early success won in Dolores attracted considerable popular support and Allende later testified that the response of the local populace surpassed all expectations.<sup>91</sup>

Leaving Dolores behind, the rebels placed hostage gachupines in the vanguard of the rebel army. Imprisoned, abused, and forced to march, the debased Spaniards were put on public display. Their obvious misery and degradation heightened the popular appeal of the initial insurrection. Moreover, their presence at the head of the rebel forces had a practical significance beyond the psychological impact of the blatant abuse heaped upon the former oppressors of the people. Juan Antonio de Evía, resident of Querétaro and active participant in the preparations for the defense of that city, wrote to Coronel Conde de Casa Rul that Allende placed his prisoners at the head of the army to discourage resistance. Evía warned the coronel that Allende promised to immediately kill all gachupines held captive if anyone fired upon the advancing rebel forces.<sup>92</sup>

Significantly, Mora claimed that not all those who took up arms with Hidalgo during these early incidents in Dolores did so

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<sup>90</sup> Alamán, *Historia de Méjico* 1: 241. William Taylor, in his study of rebellion in eighteenth century New Spain, asserted that local jails were the "most frequent inanimate victim of the people's wrath." The jail represented "the most concrete and hated symbol of the rule of alien law." Taylor, *Drinking, Homicide and Rebellion*, 119.

<sup>91</sup> Causa instruída contra el Generalísimo D. Ignacio de Allende. Chihuahua, 10 de mayo - 20 de junio de 1811, *Documentos Históricos Mexicanos*, vol. 6, p. 7.

<sup>92</sup> D. Juan Antonio de Evía á Coronel Conde de Casa Rul, Querétaro, 25 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 46, pp. 108-110.

willingly.<sup>93</sup> Reporting the progress of the rebellion on 25 September, Alcalde Ochoa of Querétaro similarly noted that the rebels used fear and coercion to increase the size of their forces.<sup>94</sup> Furthermore, during early October, one resident of Guanajuato reported that Hidalgo's approach and the impending sack of the city created an overbearing climate of fear and uncertainty. Intendant Riaño intensified popular apprehensions by focusing his defensive preparations on the *Alhondiga de Granaditas*. He also ordered that all the movable wealth in the city be concentrated within this fortified granary. Here, too, all the resident European Spaniards gathered to escape the onrush of the rebels. To many residents in the city, it appeared that Riaño wished to protect only a favored few along with their wealth and that he would abandon the rest to the rebels.<sup>95</sup> Although the vast majority of the city's lower classes already supported Hidalgo, Riaño's actions increased that number. These latecomers embraced the insurgent cause judging it best to display the proper degree of enthusiasm for the revolution.<sup>96</sup>

For the common people, neither the concept of independence nor fear were instrumental factors in moving them into a state of

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<sup>93</sup> Mora, *México y sus Revoluciones* 3: 30.

<sup>94</sup> Ochoa á Venegas, Querétaro, 25 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 45, p. 107.

<sup>95</sup> Carta de Guanajuato detallando lo ocurrido al ser atacada y tomada la ciudad por el Sr. Hidalgo, Guanajuato, 2 de octubre de 1810, *Colección de Documentos*, vol. 2, no. 61, p. 127.

<sup>96</sup> D. Francisco de la Mota y Torres reported on 20 September, 1810, that the majority of the residents in both Guanajuato and Celaya were already clearly on the insurgent side. Francisco de la Mota y Torres á [?], Querétaro, 20 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 36, p. 79.

open rebellion. Contemporary historians like Alamán, Mora, and even the partisan Bustamante, all agreed that an unquenchable thirst for pillage was the principal driving force motivating those who joined the insurrection.<sup>97</sup> In Dolores, Indian and casta rebels robbed and burned gachupín residences. Upon entering San Miguel, Hidalgo mounted a high balcony and shouted to the people: "seize everything my children for all is yours." In response, the mob that made up the bulk of Hidalgo's army proceeded to sack many shops and stores owned by European Spaniards.<sup>98</sup> Such acts recurred all along the route of Hidalgo's advance. Because of its thoroughness and bloody character, the sack of Guanajuato is most often put forward as the single most convincing piece of evidence attesting to the great appetite of Hidalgo's horde.<sup>99</sup>

During the early weeks of the revolt, the techniques used by Hidalgo to generate support for his cause produced dramatic results. From the first day the size of Hidalgo's army increased exponentially. By mid-afternoon on 16 September it numbered five hundred.<sup>100</sup> As evening approached, Hidalgo set out for San Miguel leading nearly four thousand eager campesinos.<sup>101</sup> Leaving Celaya on 23 September,

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<sup>97</sup> Alamán, *Historia de Méjico* 2: 142; Bustamante, *Cuadro Histórico* 1: 42.

<sup>98</sup> Alamán, *Historia de Méjico* 1: 246.

<sup>99</sup> For a detailed account of the sack of Guanajuato, see: Mora, *México y sus Revoluciones* 3: 37-47.

<sup>100</sup> Causa instruída contra el Generalísimo D. Ignacio de Allende, Chihuahua, 10 de mayo - 20 de junio de 1822, *Documentos Históricos Mexicanos*, vol. 6, pp. 5-7.

<sup>101</sup> Mora, *México y sus Revoluciones* 3: 31.

the rebel force that moved on Guanajuato numbered 25,000 or more.<sup>102</sup> "Day by day," wrote Ochoa to Viceroy Francisco Javier de Venegas, "many men are adding themselves into the ranks of the rebels: some out of fear, others for status and [most] for the pillage."<sup>103</sup> Two weeks after the fall of Guanajuato, the rebels numbered an amazing sixty thousand.<sup>104</sup>

Similar, if less dramatic, success was achieved in the regions immediately adjacent to the Bajío. Seeking to tap the latent power of the rural villagers, landless laborers, and the urban unemployed, Hidalgo entrusted numerous ambitious and capable agents with the task of mobilizing distant populations in such areas as the Altos de Jalisco and Huichapán.<sup>105</sup> Those agents who took on this task acted as "brokers." They possessed the ability to link "individuals who wanted to stabilize or improve their life chances . . . with nation-oriented individuals" who operated at the uppermost political levels.<sup>106</sup> Essentially, the commissioned emissaries of Hidalgo represented a

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<sup>102</sup> Hamill, *Hidalgo Revolt*, 124; Mora placed the rebel strength during the attack on Guanajuato at 40,000 or more. See Mora, *México y sus Revoluciones* 3: 41-42.

<sup>103</sup> Ochoa á Venegas, Querétaro, 27 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 45, p. 107.

<sup>104</sup> Hamill, *Hidalgo Revolt*, 124.

<sup>105</sup> According to one spy in the service of Calleja, Hidalgo spent a great deal of time appointing officers and creating commissions within his own army and to those intended to propagate the rebellion throughout New Spain two days before the attack on Guanajuato. *Ibid.*, 147.

<sup>106</sup> Wolf, "Group Relations," 1075-76. Significantly, Wolf adds that such individuals did not resolve the conflicts between x and y levels, but used the tensions produced between the two in order to propel their own advancement, *ibid.*, 1076-1077.

"rural middle sector" upon which the "urban bourgeoisie" was dependent. Without access to this group, the central creole leadership would have been unable to proliferate rebellion.<sup>107</sup>

During the Hidalgo revolt, and the independence period more generally, lower ranking members of the Church often fulfilled such functions for the rebel leadership.<sup>108</sup> In addition to the clergy, Mora indicated that Hidalgo and Allende actively sought to recruit persons of "superior rank" capable of mobilizing popular support.<sup>109</sup> Superior rank, though an ambiguous designation, can be interpreted to mean such persons as rancheros, tavern keepers, and *arrieros* (muleteers). Mayordomos and other responsible estate personnel also acted as significant "linking-agents" in the insurrection.<sup>110</sup>

The personal histories of the many individuals who received commissions from Hidalgo confirm these generalizations. José Antonio Torres, appointed to raise Hidalgo's banners in the intendency of Guadalajara, worked at various times before the insurrection as an *arriero* and *mayordomo*. The numerous connections that he developed in the area around Zacoalco, Zamora, Sayula, and Colima, aided him considerably in his drive to take

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<sup>107</sup> Hamnett, *Roots of Insurgency*, 125-126.

<sup>108</sup> For two insightful discussions of the role of the Mexican clergy and independence, see: Karl M. Schmitt, "The Clergy and the Independence of New Spain." *Hispanic American Historical Review* 34 (1954): 289-312; David A. Brading, *El Clero Mexicano y el Movimiento Insurgente de 1810*, *Relaciones, Estudios de Historia y Sociedad* 5 (invierno 1981): 5-26.

<sup>109</sup> Mora, *México y sus Revoluciones* 3: 26.

<sup>110</sup> Archer, "History of the Independence of Mexico." 7.

Guadalajara.<sup>111</sup> Julián Villagrán, the rebel patriarch of Huichapán who led 4,000 troops by March of 1811, served as a militia captain at Tula before he joined the rebellion in October, 1810.<sup>112</sup> The most famous of Hidalgo's agents, Father José María Morelos, the parish priest of Carácuaro, received his commission from Hidalgo at Irapuato just outside of Valladolid in October, 1810. Hidalgo charged Morelos with raising revolution in the hot country, *tierra caliente*, of the south with the ultimate goal of capturing Acapulco.<sup>113</sup> All possessed favorable local reputations which they later exploited to their advantage.

Each agent received considerable independent power to assume military command within specific geographic areas. By Hidalgo's authority, they formed armed companies and appointed their own subordinate officers who were ordered to apprehend all European Spaniards and to confiscate their economic assets.<sup>114</sup> Nominally, the gachupines were to remain unharmed. Yet, in at least one instance, Hidalgo issued specific order to kill outright any European Spaniards who agitated against his cause.<sup>115</sup> Sequestered Spanish assets,

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<sup>111</sup> Luis Pérez Verdia, *Apuntes Históricos sobre la guerra de independencia en Jalisco* (1886; reprint, Guadalajara: Ediciones I.T.G., 1953), 12-15.

<sup>112</sup> José María Miguel i Vergés ed., *Diccionario de Insurgentes* (Mexico: Editorial Porrúa, S.A., 1969), 605-606; Christon Archer, "Banditry and Revolution in New Spain, 1790-1821," *Bibliotheca Americana* vol. 1, no. 2 (1982): 73.

<sup>113</sup> Ernesto Lemoine Villacaña, et al., *Morelos, su vida revolucionario á través de sus escritos y de otros testimonios de la época* (México: Universidad Nacional Autónoma de México, 1965), 32-40.

<sup>114</sup> Ibid., document no. 2, p. 157.

<sup>115</sup> Hidalgo á Hermosillo, Guadalajara, 3 de enero de 1811, *Colección de Documentos*, vol 1, no. 8, pp. 24-25.

meanwhile, became the principal means of sustaining the rebel forces. Finally, the terms of the commissions required regional lieutenants to remove Europeans from all political and military posts and to put an end to tribute and slavery in their area of operations.<sup>116</sup> Strategically, the use of regional emissaries or lieutenants touched off secondary movements which magnified the impact of Hidalgo's initial insurrection and stretched thin the defensive capabilities of the royalists.<sup>117</sup>

The methods used by each regional cabecilla varied considerably. Yet, the conduct of most mirrored Hidalgo's original efforts in mobilizing Dolores. For example, Don José Mercado, the father of the el cura Mercado of Ahualulco (the younger Mercado, also named José, was commissioned by Torres to take the area around San Blas north of Guadalajara), invoked the respected name of his son and the name of the king during his rural campaign. Such practices apparently won him significant support and, after having seized the Hacienda de la Labor, he expressed considerable optimism to his son over the prospect of his continued success.<sup>118</sup> In another

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<sup>116</sup> Villacaña, *Morelos*, doc. no. 2, p. 157.

<sup>117</sup> Eric Van Young argued that explanations of the origins of the rebellion which concentrate on the supposed class struggle between creoles and gachupines or political models which illustrate the collapse of the accepted colonial compact are insufficient. Rather, he suggests that 'the mobilizing and radicalizing force of rebellion itself, once under way, in touching off secondary movements' provides greater insight into the birth and expansion of the rebellion. See, Van Young, "Moving Toward Revolt," 204.

<sup>118</sup> Nombramiento que el Sr. Cura D. José Mercado expide á su padre d. José par perseguir europeos, 13 de noviembre de 1810. *Colección de Documentos*, vol. 1, no. 111, pp. 345-346.



instance, Rafael Iriarte appointed padre Juan Salazar "Commander of Volunteers." Iriarte empowered Salazar to lead "all who want[ed] to accompany him under my Christian Banners in order to exterminate the Europeans who conspire to annihilate us and reduce us to a state of unhappy subjugation."<sup>119</sup>

Throughout the provinces, the prospect of pillage attracted many to the rebel cause. The case of Rafael Iriarte who operated in the intendancies of Zacatecas and San Luis Potosí is particularly illustrative. Upon receiving news of the Grito, Iriarte, a soldier of the San Luis Potosí brigade, immediately formed a small band and sacked the properties of the gachupines living in León, located to the west of Guanajuato. Encouraged by this success, he promoted himself to the rank of coronel and in early October, 1810, occupied Aguascalientes situated north of León. With a stroke of good fortune, the mining city of Zacatecas subsequently capitulated to his growing "undisciplined and turbulent" army.<sup>120</sup> Ever the opportunist, Iriarte moved on to San Luis Potosí in November. Here he imprisoned and then set free the rebel Luis Herrera along with his lieutenants who had previously captured the city for Hidalgo. By this scheme Iriarte amassed for himself a fortune of a half million pesos.<sup>121</sup>

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<sup>119</sup> Iriarte comisado Padre Fray Juan Salazar, Quartel General de Ojuelos, 2 de diciembre de 1810, *Colección de Documentos*, vol. 1, no. 72, p. 227.

<sup>120</sup> Miguel i Vergés, ed., *Diccionario de Insurgentes*, 295.

<sup>121</sup> Ibid. For further details on the activities of Iriarte see Alamán, *Historia de México* 2: 16-30; Mora, *México y sus Revoluciones* 3: 93. Allende, making preparations for the rebel retreat towards the United States, left orders with Ignacio Rayón to execute Iriarte who, in November, 1810, failed to come to the assistance of Allende to defend Guanajuato against Calleja. Ibid.

Most other fortunes made by the insurgents did not approach the magnitude of Iriarte's, though the sums were nevertheless considerable. At San Luis Potosí, Manuel de Luévano received a commission from Tomás Villanueva - an immediate subordinate of Iriarte - to "unite men about him, apprehend Europeans, and take charge of their property." Luévano gathered twenty men and eagerly worked to fulfill his commission. At el Rancho de Santo Domingo, near Chacras, he seized 213 mules. Selling 26 of these for 700 pesos, Luévano deposited an additional number at el Rancho de San Diego del Lobo while the rest he sent to aid Iriarte's forces at Aguascalientes. From the owner of this rancho, Ramón Cardona - a European Spaniard - Luévano also seized 4,300 pesos in cash. In total, he remitted 2,500 pesos to Iriarte. This left him and his men with a considerable profit.<sup>122</sup>

Hidalgo's use of commissioned emissaries was a tremendous success. Almost the whole of the north fell in line under his banners. Torres, in Nueva Galicia, continued to make considerable progress. In the south, the campaigns of Morelos moved at a slow but even pace. Yet, inasmuch as this success was based on mass popular support and the prospect of pillage, immediate gains reduced the prospect of an ultimate victory. The original conspirators plotted a creole revolution in which they would win power and status by displacing the gachupines. Yet, Hidalgo and his co-conspirators, pressed for time by the premature discovery of their plot, unleashed a massive popular

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<sup>122</sup> Sumaria instruída contra el cabecilla insurgente J. Manuel de Luévano, quien fué fusilado y cuyo cadáver fué descuartizado, Aguascalientes, 20-22 de julio de 1811, *Documentos Históricos*, vol. 6, no. 22, pp. 296-300.

insurgency to achieve this very limited end. This fateful choice alienated the very class which they proposed to place in power.<sup>123</sup> Almost immediately, creoles began to forget their long standing grievances with the gachupines. On 30 September, the citizens of el Real de Agangueo wrote to Viceroy Venegas rejecting the revolt begun by Hidalgo:

"the fire of loyalty and patriotism burns within us . . . . We detest the movement [begun] by those [dissidents] and their leaders and we resolve to put ourselves in opposition to it even though our lives and interests are in danger."<sup>124</sup>

Significantly, this proclamation of fidelity was made by a "junta composed of European Spaniards and Americans."<sup>125</sup>

Other creoles prepared themselves for the fight against the enormous *tumulto* (riot) let loose by Hidalgo. Perceiving that the threat posed by the mob applied equally to their own lives and property in addition to those of the gachupines, some began to organize local defences. This was particularly the case in Querétaro where residents became convinced that a preemptive strike against the rebels could save them from the grasping destructiveness of the poor.<sup>126</sup> Others enlisted directly in the royal armies forming at

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<sup>123</sup> Hidalgo's loss of creole support and the role of propaganda in the recruitment of creoles to the royalist cause is well developed in Hamill, "Psychological Warfare," 208, 211, 218 *passim*.

<sup>124</sup> José Joaquín de Flores al regent de la Real Audiencia, México, 29 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 55, pp. 119-120.

<sup>125</sup> *Ibid.*

<sup>126</sup> Ochoa á [Venegas ?], Querétaro, 22 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 38, pp. 82-84; Evía á Coronel Conde de Casa Rul,

various points throughout the realm. Their service proved instrumental in halting the initial onrush of the rebellion. Félix Calleja, the commander of the Royal Army of the Center, showered these creoles with glowing praise for their loyalty and bravery.<sup>127</sup>

Allende and Aldama, at least, perceived the harm being done by Hidalgo's policy of mass mobilization. By nature, Allende distrusted the mass character of the movement. Although he conceded the necessity of including the "tributary classes" in the uprising, he would have preferred a "well ordered campaign" conducted by disciplined troops.<sup>128</sup> Such concerns prompted efforts to create a more formal organizational structure for the rebel forces. At Celaya, the rebel leadership established a rudimentary military hierarchy. Hidalgo took the title Generalísimo of the Army, while Allende became Teniente General and Aldama received the rank of Mariscal de Campo.<sup>129</sup> Later, at Acámbaro after the capture of Valladolid, further attempts were made to define the hierarchy of command.<sup>130</sup>

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Querétaro, 25 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 46. pp. 108-110. A preemptive strike was actually made at el Puerto de Carrosa, see below.

<sup>127</sup> Christon Archer, "The Royalist Army in New Spain: Civil-Military Relationships, 1810-1821," *Journal of Latin American Studies* 13 (1): 65-66. For the gachupines, Calleja held only scorn. Many European Spaniards fled as refugees offering no resistance to the rebels. To Calleja such behavior represented inexcusable cowardice that engendered the rapid spread of panic throughout the colony.

<sup>128</sup> Hamill, *Hidalgo Revolt*, 142.

<sup>129</sup> Ochoa á Venegas, Querétaro, 27 de septiembre de 1810, *Colección de Documentos*, vol. 2, no. 45, p. 107.

<sup>130</sup> Alamán, *Historia de Méjico* 1: 299.

Such steps, however, met with little success. The number of commissions awarded by Hidalgo within his own army were so numerous that Alamán noted that "in order to receive one, [a person] had to do nothing more than ask."<sup>131</sup> In the provinces, regional lieutenants could not be controlled effectively. In December, 1810, Hidalgo openly questioned the integrity of regional representatives who failed to provide clear detailed accounts of the goods and properties seized from the Spaniards.<sup>132</sup> In another incident, Hidalgo complained to the younger Mercado that all those in whom he had invested his confidence continually strayed away from the plan of operations: "each one works towards his own ends debilitating the unity needed to rally in the face of the forces of the enemy."<sup>133</sup> The creole leadership faced chronic insubordination and they could do little to protect the lives and property of creole bystanders.<sup>134</sup> To remedy such problems, Torres, for example, instructed Mercado to simply take inventories of sequestered properties and not to permit

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<sup>131</sup> Ibid., 287.

<sup>132</sup> Hidalgo á Hermosillo, Guadalajara, 30 de diciembre de 1810, *Colección de Documentos*, vol. 1, no. 7, pp. 23-24.

<sup>133</sup> Hidalgo á Mercado, Guadalajara, 16 de diciembre de 1810, *Colección de Documentos*, vol. 1, no. 131, p. 359-360.

<sup>134</sup> For one example of insubordination, see *Colección de Documentos*, vol. 1, no. 128, p. 129. In this case, the central dispute revolved around who held authority within the region around San Blas, the younger Mercado (the designated authority) and a cabecillas named Lopez who carried out a number of unauthorized pillage raids.

the sacking of those haciendas by his troops.<sup>135</sup> Such instructions, however, possessed no real power of compulsion.

The problem of control within the ever expanding structure of command stemmed from the divergent interests held by the regional cabecillas and the central creole leadership. Both groups desired greater upward social mobility and armed rebellion threw open the possibilities for individual advancement. Through insurrection, creoles hoped to displace the gachupines. Yet, lesser cabecillas commanding armed rebel gangs assailed the former elite class more generally - creole and gachupín alike. In a sense, regional military chieftains pursued a "mestizo social strategy," though certainly not all cabecillas were of mixed blood.<sup>136</sup> During the colonial period, such individuals, that is to say persons of intermediate rank in society, were apt to seek out extra-legal possibilities in order to improve their condition.<sup>137</sup> Among these 'mestizos' one might find cattle rustlers, smugglers, and a host of other ambitious middlemen.<sup>138</sup> With the onset of Hidalgo's revolt, these peripheral intermediaries assumed the role of "linking-agents" connecting the creole leadership with the common people. Movements of the Hidalgo stripe, according to Eric Wolf and Edward Hansen "created homes" for these marginalized men who were denied "formally allocated positions in

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<sup>135</sup> Torres á Mercado, Guadalajara, 27 de noviembre de 1810, *Colección de Documentos*, vol. 1, no. 114, p. 347.

<sup>136</sup> Eric Wolf and Edward Hansen, "Caudillo Politics: A Structural Analysis." Comparative Studies in Society and History 9 (1967): 172-173.

<sup>137</sup> Wolf, "Group Relations," 1068.

<sup>138</sup> Wolf, "Caudillo Politics," 172.

society."<sup>139</sup> Their fundamental motivation was "to curtail the power of society's traditional [elites] while increasing their own."<sup>140</sup>

The failure of the insurrectionary leadership to control the collected masses that made up their army of operations compounded the crisis produced by independent action on the part of Hidalgo's many regional commanders. The popular lust for booty posed the greatest problem. At Guanajuato in late September, 1810, Hidalgo attempted to prohibit further pillage after the fall of the Alhondiga. However, rioting rebels ignored this plea for order. In desperation and disgust, Allende took up his own sword and led a small company of soldiers to forcibly disperse those rioters who continued to take advantage of the disorder created by the fall of the established authorities.<sup>141</sup> Although calm was restored in Guanajuato, the situation already had passed beyond the control of the rebel leaders. Yet, as Hidalgo later admitted, the need to maintain the interest of the lower classes in their challenge to the viceregal regime did not "permit [them] to scruple about the means" by which this end was won.<sup>142</sup>

Despite the negative effect that such behavior had on the creole population at large, Hidalgo continued to depend on a strategy built around the force of "sheer numbers" whose "unstoppable impetus . . .

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<sup>139</sup> Eric Wolf, *Peasant Wars of the Twentieth Century* (New York: Harper and Row, Publishers, 1969), 289; Wolf and Hansen, "Caudillo Politics," 172.

<sup>140</sup> Wolf, *Peasant Wars*, 286-87.

<sup>141</sup> Alamán, *Historia de Méjico* 1: 283.

<sup>142</sup> Declaración del Cura Hidalgo, Chihuahua, 7 de mayo de 1811, *Colección de Documentos*, vol. 1, no. 2, p. 16.

would necessarily result in the inability of the enemy to recover from the first devastating blow."<sup>143</sup> On 6 October, 1810, Hidalgo suffered a minor defeat which should have convinced him to modify his approach to the war. During a skirmish at el Puerto de Carroza nine leguas (38 km) distant from Querétaro, a small infantry detachment commanded by Captain Bernardo Tello routed a rebel force containing more than 2,000 men. Tello's own forces suffered negligible losses during the engagement. Only one royalist soldier died after having accidentally wandered in front of his own cannon during the night. Four to six other royalist troops received superficial wounds. The rebels, on the other hand, incurred a loss of 200 dead.<sup>144</sup>

Although the Carroza skirmish demonstrated that quantity was a poor substitute for quality, Hidalgo continued to place his trust in the ability of his mass army to achieve decisive victories. Major Manuel Gallegos of the provincial militia of Valladolid who joined Hidalgo with his troops after Valladolid fell on 17 October, advised the cura against this approach. Gallegos urged Hidalgo to take two months out from his advance and retreat into the mountains of Pátzcuaro in order to impress greater discipline upon the uncontrolled rabble.<sup>145</sup> Hidalgo laughingly dismissed Gallagos' suggestion as ill conceived and foolish.<sup>146</sup>

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<sup>143</sup> Mora, *México y sus Revoluciones* 3: 73.

<sup>144</sup> Alamán, *Historia de Méjico* 1: 294-295. For another account of these events, see Christon Archer, "Civil-Military Relationships," 64.

<sup>145</sup> Alamán, *Historia de Méjico* 1: 299.

<sup>146</sup> Bustamante, *Cuadro histórico* 1: 61-62.



Had Hidalgo followed the advice of Gallago, it is probable that the momentum which powered his army would have been lost and with it any hope for a quick victory.<sup>147</sup> Little time existed to adequately train so many troops. Even though Hidalgo's horde enjoyed virtually unopposed success during its march on Mexico City, royalist forces under the supreme command of Félix María Calleja consistently built up their own momentum as they converged on Querétaro.<sup>148</sup> Furthermore, Hidalgo had to contend with the distinct possibility that attempts to instill rigorous discipline would have driven much of his army back to their homes.

As revolutionaries, the rank and file of Hidalgo's soldiers possessed only limited commitment. Their outlook was reactionary and geared towards the resolution of specific localized issues.<sup>149</sup> Villagers eagerly embraced the prospect of immediate material reward through pillage. Yet, beyond this, many took up such arms as they had in order to restore the traditional balance of life that had been so dramatically disrupted by the shifting basis of agriculture after 1750. Previously, rural villages in the Bajío, with their close dependence upon neighboring haciendas, expected a certain degree of interference from agencies foreign to their own communities. Hacendados intruded most dramatically on local life but others, such

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<sup>147</sup> Hugh Hamill, on the other hand, is adamant in his criticism of Hidalgo for failing to take time out to train his troops, see Hamill, *Hidalgo Revolt*, 120.

<sup>148</sup> Alamán, *Historia de Méjico* 1: 290 passim.

<sup>149</sup> Archer, "History of Mexican Independence," 7; Jorge I. Domínguez, *Insurrection or Loyalty: The Breakdown of the Spanish American Empire* (Cambridge: Harvard University Press, 1980), 25.

as commercial agents who held rights to the *repartimiento de comercios* or tribute and other tax collectors, also became recognized if not wholly accepted actors in the relations between the community and society at large. Villagers peacefully coexisted with their neighbors and refrained from attacking those external agents who occasionally interrupted their daily lives in exchange for an unspecified but real degree of autonomy and security.<sup>150</sup> Exploitation, in terms of demands placed upon the labor of villagers by hacendados or in the form of the tribute and other levees collected by the government and its representatives, was not totally antithetical to the "moral economy" that defined rural life.<sup>151</sup> With the dearth of 1808-1810, however, the relative levels of exploitation and hardship became unbearable. Consequently, popular discontent reached explosive proportions.<sup>152</sup>

With his Grito, Hidalgo supplied the impetus needed to push the depressed countryside into action. The creole insurrection provided Indian communities and other small holders with the opportunity to rise up and redress past encroachments that had reduced available land resources, cut off access to water, and

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<sup>150</sup> Repartimiento de comercios was a license giving the holder exclusive privilege to sell goods to populations within a specific territory. This monopolistic devise, although outlawed by the Bourbons due to the abuses that frequently resulted, continued to be a widespread practice in rural New Spain. Tutino, *From Insurrection to Revolution*, 26-31.

<sup>151</sup> Ibid. For a comparative example on the effect of extreme imbalances within moral economy of highland Peru and the contagion of rural violence during the Thupa Amaru II rebellion, see Ward Stavig, "Ethnic Conflict, Moral Economy, and Population in Rural Cuzco on the Eve of the Thupa Amaru II Rebellion," *Hispanic American Historical Review* 68:4 (1988): 737-770.

<sup>152</sup> Hamnett, *Roots of Insurgency*, 106.

otherwise upset the long accepted balance between hacendado and campesino.<sup>153</sup> Yet, once local issues were settled, enthusiasm for Hidalgo's insurrection diminished accordingly. The vast majority of those who followed Hidalgo were backward looking revolutionaries. They idealized some former condition of life where the present abuses from which they suffered were unknown. The focus of this vision, which some have suggested represented a kind of peasant ideology, was localized and did not seek to progressively change society at large.<sup>154</sup> Where the balance of life was restored, many once again began to conduct life as usual. At Guanajuato, for example, Alamán noted that local Indians eagerly added themselves to the rebel forces to partake in the sack of the city. Once the sack had been completed, however, many of these "indios" retired back to their pueblos and ranchos abandoning Hidalgo's crusade on the capital.<sup>155</sup>

The weak will of Hidalgo's army showed itself during the critical battle at el Monte de las Cruces. With the viceregal capital a

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<sup>153</sup> Cheryl English Martin, *Rural Society in Colonial Morelos* (Albuquerque: University of New Mexico Press, 1985), 194-195.

<sup>154</sup> Peasants should not be considered as being apolitical or pre-political. Rather, as Alan Knight has indicated for the rural classes of Mexico during the 1910 revolution, peasants were dependent upon outside agitators or traditional authoritative figures who helped "peasants act" on the basis of their common plight which "bred solidarity" and generated resistance - non-violent and violent. During the independence war, as in the 1910 experience, the war was driven by the latent power of the isolated village. Bereft of alternatives, villages turned to its own "internal resources for ideological expression and military organization." The village was the cell of revolution whose motivation derived from an internal self awareness which, in times of crisis, was capable of transcending fractious divisions within the community itself. Alan Knight, *The Mexican Revolution*, 2 vols. (Cambridge: Cambridge University Press, 1986), vol. 1, pp. 161-164; Taylor, *Drinking, Homicide and Rebellion*, 145; Van Young, "Conflict and Solidarity in Indian Village Life," 75.

<sup>155</sup> Alamán, *Historia de Méjico* 1: 285.

few short miles away, the disorganized rebel army received its first major lesson in the destructive capacity of disciplined troop formations used in combination with appropriately placed artillery pieces. At las Cruces, rebel forces exceeding 80,000 men forced the 2,500 royalist troops commanded by Lieutenant Coronel Torcuato Trujillo into a controlled retreat towards the capital.<sup>156</sup> Short on munitions and other supplies and fearing the destruction his rabble would wreck upon his prize, Hidalgo chose not to press his victory by launching an immediate attack on Mexico City. He decided instead to retreat back towards Querétaro in order to more completely consolidate his position.<sup>157</sup>

The rapid dispersal of his army may have influenced Hidalgo's decision to retreat as much as any other factor. Bruised by the disciplined fire of the royalists, perhaps as many as 20,000 Indian and casta troops abandoned Hidalgo's army.<sup>158</sup> Those who fled the field clearly decided that their former quiet lives offered much to be preferred over the cannon fire and musket shot which greeted them in battle. The rebel forces were further reduced as a result of the battle at Aculco (7 November 1810) fought to the south of Querétaro. During this engagement, Calleja's troops completely dispersed the

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<sup>156</sup> Ibid., 306-308.

<sup>157</sup> Bustamante, *Cuadro histórico* 1: 73.

<sup>158</sup> García Conde, a captive of the rebel army, reported to Venegas that in addition to these deserters, Hidalgo lost as many as 20,000 casualties. Conde attributed these figures to the rebel general Jiménez. Though the figures are no doubt exaggerated, there seems to be little doubt that las Cruces was a critical test of the mettle of Hidalgo's army. Moreover, it is clear that it was found to be wanting. Alamán, *Historia de México* 1: document no. 19. 384.

rebel army. Hidalgo and Allende, according to Mora, fled to Valladolid and Guanajuato, respectively, as little more than fugitives totally stripped of the prestige which they had accumulated through their earlier victories.<sup>159</sup>

All the while the armies of the crown pressed on with great success. On 19 November, a discouraged Allende wrote to Hidalgo of his worsening position in Guanajuato: "the army of operations commanded by Calleja and Flon enters our conquered towns as they would their own homes." Allende went on to suggest that within a short time and through the astute use of promises of amnesty and threats of stern punishment, the royalist would succeed in converting any former support into hatred for Hidalgo and his new "government."<sup>160</sup> All this, Allende predicted, would result from the determination of the people to steer their own course as it best suited their continued security.<sup>161</sup> Allende's fears were well founded and within a short time popular support for the revolt subsided in Guanajuato in the face of the determined advance of Calleja. After the defeats at las Cruces and Aculco, villagers who previously embraced Hidalgo's Grito now wisely submitted, for the time being, to the royalist armies.<sup>162</sup>

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<sup>159</sup> Mora, *México y sus Revoluciones* 3: 88.

<sup>160</sup> Alamán, *Historia de Méjico* 2: 29. See also, *ibid.*, 42, for details on Calleja's bando issued to the residents of Guanajuato as evidence of the positive inducements and threats to encourage an end to resistance.

<sup>161</sup> *Ibid.*, 29.

<sup>162</sup> Despite Guanajuato's submission to Calleja in November 1810, the city continued to suffer from frequent rebel attacks. Popular sympathy for the rebellion accentuated the vulnerability of Guanajuato. Archer, "Civil-Military Relationships," 70.

While the fortunes of Hidalgo and Allende were at a low ebb in mid-November, Hidalgo's provincial emissary began to reap great dividends. On 11 November, José Antonio Torres captured Guadalajara. By this stroke, Hidalgo gained a new base from which he could recover the losses inflicted upon him at las Cruces, Aculco, and Guanajuato.

Yet, the lessons suggested by these defeats escaped Hidalgo. The new army that he raised, equipped with a considerable number of cannons captured at San Blas, differed in no great way from the one which had been defeated previously. Its size was astounding. At the battle at el Puente de Calderón fought on 17 January, 1811, the rebels fielded a force of approximately 70,000 men.<sup>163</sup> Ignoring the advice of Allende, Hidalgo once again chose to employ his troops as a single mass force. The outcome of the battle was predictable and the royalists under Calleja and Manuel Flon won the day.<sup>164</sup> Hidalgo, made prisoner shortly after the defeat at Calderón by Allende and other creoles disgusted with his continued strategy of mass attack and his monopolization of power, escaped with the other rebel leaders towards the north. At Baján, Francisco Ignacio Elizondo betrayed virtually the entire senior command of the rebel forces to the royalists. The network of regional emissaries, imperfectly controlled, paid its final dividend and the creole leaders, Hidalgo, Allende, Aldama and the other, were put to death.<sup>165</sup>

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<sup>163</sup> Hamill, *Hidalgo Revolt*, 196-202.

<sup>164</sup> Bustamante, *Cuadro histórico* 1: 147-150.

<sup>165</sup> Alamán *Historia de México* 2: 118.

The enterprise begun by Hidalgo at Dolores developed from a simple creole plot to seize power into fractious insurgency which the original cabal of creoles had scarcely anticipated. During the initial conspiracy stage, concern over the impact of mass participation in the uprising produced plans structured around overtures to better off creoles and particularly to those creoles active in the colonial militia. The focus of the plan was distinctly urban and although mass mobilization was considered, it received only limited endorsement. However, with the premature discovery of the plot, the focus of the creole leadership shifted dramatically. For the sake of expediency, the conspirators turned to overt popular rebellion to effect their insurrection against gachupín rule. Consequently, the main theater of the uprising shifted from the cities to the countryside. Here the uprising gathered the bulk of its support. The cities, as in the case of Guanajuato, Valladolid, and Mexico City, ultimately became the focus of rural discontent. In such places the mob which composed the bulk of Hidalgo's forces wrought its most visible vengeance upon their perceived oppressors.<sup>166</sup> The impoverished and unemployed readily joined their rural counterparts in this uncontrolled orgy of violence and pillage. In the process, the creole population was driven from the banners erected by Hidalgo in the name of the King, the Virgin, and creole rule. To the majority of creoles, survival in the face of what

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<sup>166</sup> Eric Van Young noted that the rebels displayed marked "anti-urban" attitudes and that Indians and castas joining the insurrection were, in many cases, rising up in rebellion "against the cities." The widespread hostility of rural Mexicans towards urban centers in conjunction with intense royalist propaganda often moved poorer urban workers to join royalist defense forces. Van Young, "Islands in the Storm: Quiet Cities and violent Countrysides in the Mexican Independence Era," *Past and Present* 118 (Feb. 1988): 135-140.

seemed to be an uncontrolled race war outweighed any supposed benefits of ending gachupín rule.

In effect, the enterprise planned and launched by Hidalgo and his co-conspirators died with their appeal to the masses. What emerged in its place was a widespread popular insurgency that focussed on the resolution of immediate localized grievances. In the countryside, dislocated populations suffering under the burden of increased outside encroachments on the land rose up to redress past wrongs. By pursuing their own interests, the lower classes undermined the success of Hidalgo's creole insurrection.

Furthermore, the linking-agents called upon by the creole leadership to mobilize the power of the lower classes pursued their own independent agendas. Specifically most sought wealth and power, although others proved to be rather dedicated in their loyalty to the cura. By entrusting these middling elements with the task of mobilizing support, the creole leadership gave them the means to achieve their own ends: armed might. This, in many cases, they used as it suited them and often to the detriment of the overall plan pursued by the central leadership. The actions of regional cabecillas further alienated the very class which the central leadership had hoped to attract, the creoles.

Faced with determined royalist resistance, the lower and intermediate classes sank back into the anonymity and isolation of rural New Spain. Many remained active after the capture of Hidalgo and the central creole leadership. Yet in the face of superior opposition, most preferred to await new opportunities to pursue their own course. This opportunist strategy emphasizing survival



denied the royalists of a complete victory. However, Hidalgo and the others at the center could not simply melt back into the countryside and wait out the course of events. The complete attention of the royalists during this period focused itself on their destruction. The regional movements were, for the time being overlooked. Their turn, however, was soon to come.

## Chapter Two:

### Winning the War? The Collapse of the Hidalgo Revolt and Royalist Counterinsurgency, 1811-1816

The outward character of the Mexican independence struggle changed dramatically in March, 1811, with the capture of Father Miguel Hidalgo. During the initial insurrection, Hidalgo stood out as the paramount leader providing a symbolic point of unity around which the forces of dissent coalesced. Even after Hidalgo's defeat at Calderón and his subsequent loss of control over the army, the new leadership led by Ignacio Allende deemed it expedient to retain Hidalgo as the titular political head of the independence movement. In this way, Hidalgo retained a symbolic significance that endured beyond the collapse of his real military and political power.<sup>1</sup> However, with the execution of Hidalgo and his senior associates, the independence movement collapsed into a guerrilla insurgency waged by numerous localized bands directed by independent military cabecillas.

Brian Hamnett has asserted that revolutions such as the one pursued by Hidalgo often carried insurgency within itself: both are propelled by common causes such as long term economic

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<sup>1</sup> According to one interpretation of Hidalgo's fall from power, Allende - the new supreme commander of the rebel forces - seriously considered dispensing with Hidalgo altogether. The rebels only retained Hidalgo as the titular political head of the political movement on the insistence of Ignacio Rayón. See Armando de María y Campos, *Allende primer soldado de la nación* (México: Editorial Jus, S. A., 1964), 226-227. However, it is generally accepted that the decision to retain Hidalgo for appearances' sake was more unanimous. See Hugh Hamill jr., *The Hidalgo Revolt: Prelude to Mexican Independence* (Gainesville, Fla.: University of Florida Press, 1966), 205.

deterioration and the dislocation of broad social groups within the population. Yet, according to Hamnett, insurgency manifests itself at the lowest levels of "political perceptions."<sup>2</sup> More specifically, an insurgency revolves around the resolution of immediate grievances such as access to land whereas the insurrectionary leadership at the center actively cultivates a broader vision of change in society. The previous chapter illustrated how Hidalgo harnessed the power of insurgency through the use of regional representatives or emissaries and how the underlying presence of insurgency frustrated attempts by the central leadership to establish creole rule. Insurgency, in this sense, contributed to the defeat of Hidalgo. As Hidalgo's revolutionary attempt to secure independence for Mexico receded, insurgency now came to the fore.

Insurgency in New Spain proved to be problematic for both the surviving members of the former rebel leadership and for the viceregal authorities. From the rebel perspective, insurgency depended on the individual initiative and direction of local military leaders whose actions frustrated attempts to unify the revolution. Violence and disorder became generalized. In these conditions, no single rebel leader successfully put forward a concerted plan to build a victorious revolutionary movement out of the insurgency that disrupted society. Indeed, factionalism developed where individual leaders aspired to assert their authority and reinvigorate the revolutionary drive. The more conventional armies formed under the

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<sup>2</sup> Brian Hamnett, *Roots of Insurgency, Mexican Regions, 1750-1824* (Cambridge: Cambridge University Press, 1986), 47-48.

rebel leadership of Ignacio Rayón and Father José María Morelos failed, in part, due to the internecine struggles within the rebel ranks produced by the self-seeking behavior of lesser insurgent leaders.<sup>3</sup>

In addition, royalist military policy frustrated rebel attempts to resurrect a concerted revolution. After the collapse of the Hidalgo revolt, the continued spread of insurgency required the regimes of Viceroy Francisco Javier de Venegas and his successor, Félix María Calleja, to reassess their military strategy to defeat the dispersed forces of the enemy. The transition followed a pattern of trial and error. The royalists eventually struck upon a set of counterinsurgency techniques designed, first, to win over local populations and then to marginalize the activities of the rebel bands.

However, competing priorities divided the resources of the crown between the need to defeat the dispersed insurgent threat and to subdue the unified armies led by rebels such as Father Morelos. As the royalists fought to contain and destroy the threat posed by Morelos, insurgency became entrenched in other regional foci of rebellion. Operations to root out these isolated, though significant remnants of insurgency were frustrated by the decentralization of command within the royalist counterinsurgency regime. While royalist commanders pursued their own plans at the expense of the centrally devised strategy to destroy insurgency, rebel forces continued to exist in marginal zones beyond the reach of the royalist troops. Despite the resilience displayed by the insurgents, many

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<sup>3</sup> Arthur L DeVolder, *Guadalupe Victoria. His Role in Mexican Independence* (Albuquerque: Artcraft Studios, 1978), 23-24.

historians conclude that by 1816 the royalists had defeated the rebels.<sup>4</sup> In fact, however, the royalist counterinsurgency effort only managed to drive the rebels into marginal zones of operations. Disorder and violence would continue after 1816 to place strains on the 'peace.'

At the last major war conference convened by the central revolutionary leadership of the Hidalgo era at Saltillo on 11 March, 1811, Ignacio Allende - the newly proclaimed Supreme Commander of the Independence Army - chose Ignacio Rayón to continue the fight in the Bajío while Allende and his group pushed on towards the United States where they proposed to regroup the strength of the revolution.<sup>5</sup> After the capture of Hidalgo, Allende, and the others at Baján on 21 March, Rayón inherited the leadership of the revolution. However, the many regional cabecillas who survived the collapse of Hidalgo's attempted revolution refused to recognize Rayón's supremacy.<sup>6</sup> The failure of a strong leader to assert himself at the head of the Hidalgo insurrection contributed to the onset of atomized insurgency after 1811.

Furthermore, independent gangs operating without any concerted plan proved unequal to the task of defeating the more

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<sup>4</sup> Hugh Hamill argues, for instance, that by 1816 there existed only a "moribund insurgency thoroughly atomized and effectively leaderless." See Hamill's article "Royalist Counterinsurgency in the Mexican War for Independence: The Lessons of 1811," Hispanic American Historical Review 53 (August 1973): 473. This view of the lull in the insurgency after 1816 can be traced to the works of Lucas Alamán. See, Lucas Alamán, *Historia de Méjico* 2d ed., 5 vols. (México: Editorial Jul, S.A., 1968), vol. 4, pp. 287, 409.

<sup>5</sup> Hamill, *Hidalgo Revolt*, 208.

<sup>6</sup> Alamán, *Historia de Méjico* 2: 149.

disciplined and better equipped troops of the royalist army. During one incident in June, 1811, for example, a royalist force comprised of a small infantry company from the Dragoons of Querétaro and a detachment of the Cavalry Regiment of Colima defeated a numerically superior rebel force. The rebels, numbering some 500 men, took up a strong defensive position in a canyon near Tomatlán in southwestern Guadalajara to resist the expected royalist attack. Despite their positional and numerical disadvantage, the royalist troops commanded by Captain Juan de la Peña y del Río engaged the rebel force and drove it into a precipitous and unorganized retreat.<sup>7</sup>

In light of the superiority of the royalist forces, guerrilla bands avoided direct confrontations and resorted to fighting only when they held an overwhelming advantage.<sup>8</sup> The attack on San Felipe located several miles to the north of Dolores in early December, 1811, by Rafael Nuñez with over three hundred insurgents illustrates the

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<sup>7</sup> Coronel Juan de la Peña y del Río á Coronel Manuel del Río., Santa Ana Amatlán, 3 de junio de 1811, *Colección de Documentos para la Historia de la Guerra de Independencia de México de 1808 á 1821*, 6 vols. ed. J. E. Hernández y Dávalos (México: José María Sandoval Impresor, 1878), vol. 3, no. 43, pp. 288-289.

<sup>8</sup> Christon Archer, "Bandits and Revolution in New Spain, 1790-1821," *Bibliotheca Americana* 1 (2): 60. Coronel Juan Camargo y Cavallero, who served in New Spain from 1791 to 1821 with the Royal Corps of Engineers, submitted a report to the king on the state of Royalist fortifications in the colony in 1815. In it he gave the following estimation of rebel tactics and capabilities: ". . . the insurgents do not choose defensible positions. They do not enlist the troops needed to establish ambushes. When they are met in battle by superior numbers they fail to attack with their cavalry. They have not [been] drilled to support the retreat of other forces unless they are allowed to retreat. It is these forces which are unable to contain the advance of the king's troops and thus they are not able to be more effective." John S. Leiby, trans., *Report to the King: Colonel Juan Camargo y Cavallero's Historical Account of New Spain, 1815* (New York, Peter Lang Publishing, Inc., 1984), 169.

rebel strategy.<sup>9</sup> Attacking at night, Nuñez and his men easily defeated the defenders of the town. In the exchange, the surprised defenders lost one captain and ten soldiers while the remainder were forced to seek refuge in a nearby hacienda. The rebels, for the time being at least, took possession of the town.<sup>10</sup>

In response to the pleas of Subdelegado Pedro Reyes of San Felipe, the royalist commander at San Luis Potosí, José Tovar, sent a relief force of one hundred men under the command of Second Lieutenant Higinio Juárez to confront and destroy Nuñez' insurgent band. After travelling the 40 leguas (240 kilometers) that separated San Felipe from San Luis Potosí, Juárez arrived only to find that the rebels had abandoned the town. Advance intelligence supplied by local rebel sympathizers allowed Nuñez to avoid a costly confrontation with royalist army regulars.<sup>11</sup> Nuñez left a token force of eighty rebels to delay the royalists while the bulk of his forces retreated to the safety of the nearby sierras north of San Felipe on the borders separating the intendancies of Guanajuato, Zacatecas and

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<sup>9</sup> Rafael Nuñez was responsible for the destruction of more than 10 large haciendas in the Guanajauto region. He was killed in action at the Hacienda de la Villela near San Luis Potosí on 7 April, 1812. José María Miguel i Vergés, ed., *Diccionario de Insurgentes* (Mexico, Editorial Porrúa, S.A., 1969), 424.

<sup>10</sup> Comandante José Tovar al Virrey Venegas, San Luis Potosí, 31 de diciembre de 1811, *Colección de Documentos*, vol. 3, no. 126, p. 526.

<sup>11</sup> Ibid. Sympathy for the rebels in areas of consistent insurgent activity prompted many non-combatants to provide valuable intelligence to rebel gangs. See, for example the case of an 80 year old man who provided the rebel Manuel Muñiz with information which led to the capture of the correspondence of Lieutenant Coronel Pedro Celestino Negrete in the region of Santa Fé and Penjamillo in January of 1812. Trinidad Medina á José Antonio Torres, Panindéquaro, 3 de febrero de 1812, *Colección de Documentos*, vol. 4, no. 20, p. 30.

San Luis Potosí.<sup>12</sup> Juarez, meanwhile, easily defeated the rebel forces that remained in San Felipe.<sup>13</sup>

The royalist forces gained no permanent advantages through such "fruitless" victories.<sup>14</sup> Once dispersed, the rebels simply regrouped at another point to carry on their struggle. The cycle of royalist pursuit, rebel defeat, dispersion and reunion, continuously repeated itself.<sup>15</sup> The unending succession of hollow victories gradually demoralized royalist troops. Long treks in search of rebels who simply disappeared left the troops exhausted.<sup>16</sup> Moreover, as the war wore on, rewarding distinguished service by the royalist officers became increasingly difficult. This, too, negatively affected the morale of the army. By September, 1813, Viceroy Calleja made it his policy to reward only those officers who acquitted themselves with extraordinary valor and success in battle. In his policy Calleja overlooked, by necessity, the praiseworthy service of those others who risked their own lives in addition to those of their troops to

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<sup>12</sup> When considering the importance of terrain in the insurgent struggle it is significant to note that the lush tropical forests of Veracruz provided a refuge for local rebels analogous to the sierras of the Bajío. See, DeVolder, *Guadalupe Victoria*, 25.

<sup>13</sup> Tovar á Venegas, San Luis Potosí, 31 de diciembre de 1811, *Colección de Documentos*, vol. 3, no. 126, pp. 526-527.

<sup>14</sup> Alamán, *Historia de Méjico* 2: 177.

<sup>15</sup> *Ibid.*, 151.

<sup>16</sup> Tovar á Venegas, San Luis Potosí, 31 de diciembre de 1811, *Colección de Documentos*, vol. 3, no. 126, p. 527. It seems that Tovar greatly exaggerated the distance separating San Luis Potosí and San Felipe. A more appropriate estimate would be somewhere around 80 to 90 kilometers. However, his exaggeration may have been intentional in order to impress upon the viceroy the need to more effectively garrison this area against rebel attack. *Ibid.*



contain the unending guerrilla actions of the rebels. The nature of the war, Calleja conceded to the Spanish Minister of War, hardly permitted him to do otherwise.<sup>17</sup>

With the rebels refusing to engage the royalists directly, their activities appeared to constitute little more than sheer banditry. The exploits of Albino García in the province of Guanajuato illustrate this point. In the years before the war, García, a native of the Valley of Santiago located in the southernmost extremes of Guanajuato, conducted a profitable business in the contraband trade of gun powder and tobacco. The dangers of his profession taught him much about the lay of the land and the best available escape routes. And, as was the case with many other smugglers who later surfaced as rebel cabecillas in the wake of Hidalgo's Grito, García made astute use of his many personal connections to unite a large band of followers.<sup>18</sup> At various times García's band ranged in size from several hundred up to as many as 5,000 - the reported size of the band which he led against Guanajuato in late November, 1811.<sup>19</sup>

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<sup>17</sup> Virrey Félix Calleja al Ministro de Guerra, Mexico, 5 de septiembre de 1813, Archivo General de la Nación (hereafter AGN): Virreyes, series 1, vol. 268-A, no. 15.

<sup>18</sup> José María Luis Mora, *México y sus Revoluciones* 3: 202. Mora asserted that, during the late colonial period, *contrabandistas* like García were "not only tolerated by the people (los pueblos) but also protected by interested men of commerce who did not want to risk being defrauded" by a disgruntled smuggler. Ibid., 221.

<sup>19</sup> Josef Manuel Jauregui á Félix Calleja, Lagos, 4 de septiembre de 1811, *Colección de Documentos*, vol. 3, no. 79, p. 370. And, El cura Labarrieta á Félix Calleja, Guanajuato, 28 de noviembre de 1811, *Colección de Documentos*, vol. 3, no. 113, p. 447.

At three in the afternoon on 31 August, 1811, the town of Lagos fell victim to García and his followers.<sup>20</sup> The sudden appearance of the rebels completely surprised the town and rushed defensive preparations failed abysmally. García, with an estimated force of 500 to 600 well armed riders, swarmed through the streets at will overwhelming the few soldiers who attempted to resist.<sup>21</sup>

Lamenting the fate of his "unhappy town," chaplain Josef Manuel Jaureguí complained to Félix Calleja that the main objective of García and his "gang [quadrilla] of thieves" was to terrorize the local populace and to scour the town for booty. "The sacking of the town was generalized and complete," reported Juaregui, "and it has left numerous families in a state of abject misery." Realizing that the town was lost, Subdelegado Antonio González, together with José Maria Rico, attempted to escape with their small force of defenders. Reacting to the flight of González, García's gang gave chase and soon overtook the subdelegado's party. Meeting out cruel revolutionary justice, the rebels subjected González and Rico to violent physical abuse. Following García's orders, they stripped the two men naked, strapped them to the backs of separate horses, and marched them back into Lagos. Here, García's men continued to humiliate their prisoners while they prepared for their execution. Fortunately for

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<sup>20</sup> Like San Felipe, Lagos was situated beyond the immediate range of the regular army units garrisoned in the major urban centers and, consequently, it was subjected to repeated insurgent attacks. Tovar á Venegas, San Luis Potosí, 31 de diciembre de 1811, *Colección de Documentos*, vol. 3, no. 126, p. 526.

<sup>21</sup> Josef Manuel Jaureguí á Calleja, Lagos, 4 de septiembre de 1811, *Colección de Documentos*, vol. 3, no. 79, p. 370.

González and Rico, local priests interceded and saved the lives of the "gravely wounded" royalists.<sup>22</sup>

The Lagos incident demonstrated that many guerrilla bands took advantage of the upheaval and disorder created by the insurgency to enrich themselves. Many historians have suggested that such acts possessed no connection whatever to the professed goal of independence.<sup>23</sup> However, as Christon Archer has pointed out, the "guerrillas-bandits" themselves became agents of disorder, further perpetuating the instability out of which change might be won.<sup>24</sup> Disorder created the conditions in which both individuals and communities could push back the intrusions of aggressive hacendados or speculating urban merchants. "Disorder," according to Paul Vanderwood, "shielded rural interests from [outside] encroachments."<sup>25</sup> The guerrilla-bandit, in this sense, acted as an "avenger" of the people.<sup>26</sup> Furthermore, the public humiliation of authoritative figures such as Subdelegado González provided a symbolic outlet for the frustrations pent up inside the depressed poor of the Bajío, Nueva Galicia, the Huasteca, Veracruz, and the

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<sup>22</sup> Ibid. Other accounts of this incident can be found in Alamán, *Historia de Méjico* 2: 189-190; and Hamnett, *Roots of Insurgency*, 181.

<sup>23</sup> For a traditional view to this affect, see Alamán, *Historia de Méjico* 2: 190. DeVolder wrote, more recently, that rebel "chieftains were free-lancers who appeared to be more interested in personal gain than in winning independence for Mexico." DeVolder, *Guadalupe Victoria*, 24.

<sup>24</sup> Archer, "Banditry and Revolution," 60.

<sup>25</sup> Paul J. Vanderwood, *Disorder and Progress: Bandits, Police, and Mexican Development* (Lincoln: University of Nebraska Press, 1981), 27.

<sup>26</sup> Eric J. Hobsbawm, *Bandits* (London: Ebenezer Baylis & Son, 1969), 15.

tierra caliente to the southwest of Mexico City. Although it is tempting to conclude that García was nothing more than a self-serving criminal bent on terrorizing the rural population, his evident disdain for the established authorities and his fearless resistance to royalist opposition won him considerable popular support in the villages of the Pénjamo, Piedragorda, Iruapuato and León districts of the Bajío.<sup>27</sup>

Other rebel leaders such as Ignacio Rayón and José Morelos, however, denounced the type of behavior practiced by the likes of García. Indeed, in March, 1812, Rayón, acting under the auspices of the National Junta that he had established at Zitácuraco in the intendancy of Valladolid, condemned García as an insidious "criminal." Rayón charged that García's constant depredations and "despotic" conduct "[degraded] . . . our Glorious Enterprise." Rayón concluded his tirade by branding García a "Traitor to the Nation" and by issuing orders directing all defenders of the insurgent cause to secure García's immediate arrest.<sup>28</sup> Naturally García denied these charges. For his part, Rayón lacked the ability to carry through his threats in areas outside the junta's immediate zone of control which

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<sup>27</sup> Hamnett, *Roots of Insurgency*, 181. Lucas Alamán commented that García persisted in the memory of the inhabitants of the Bajío as a "romantic personage" whose life and deeds became the subject of innumerable popular anecdotes. Alamán, *Historia de Méjico* 3: 387 document number 4.

<sup>28</sup> Bando de la suprema junta nacional sobre el orden que debe guardarse y penas impuestas a los infractores, Sultepec, 18 de marzo de 1812, *Colección de Documentos*, vol. 4, no. 35, pp. 44-45. Other pertinent documents held in this volume include numbers 39 and 44.

itself was shifting and shrinking as a result of constant royalist pressure.<sup>29</sup>

Morelos, like Rayón, condemned all wanton acts by guerrillas which threatened to drive support away from the rebel cause. For example, on 30 September, 1812, Morelos ordered his lieutenant in southwestern Puebla, Valerio Trujano, to "proceed against all those who have taken up evil ways damaging to their fellow man especially in [the form of] robbery and looting." Anyone found guilty of such a crime, "even if it were the theft of but a single peso," was to be given his last rites and executed within three hours of being apprehended.<sup>30</sup>

The activities of García, in addition to the countless other rebels who took advantage of the disruptions of the war to acquire both recognition and wealth, contributed to the growing sense among the white population of New Spain that the revolution for independence had become little more than a caste war. Morelos moved quickly to dispel such apprehensions. On 13 October, 1811, he issued a statement concerning the seizure of the goods and property of European Spaniards. In it he reasserted the position developed in the early days of the Hidalgo revolt: any and all goods and assets in the possession of European Spaniards were to be seized and used to

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<sup>29</sup> The royalists vigorously pursued the Zitacuraco Junta in order to prevent it from becoming a permanent point around which the rebels could create an alternative government which might gain legitimacy in the eyes of the Mexican population. Hugh Hamill, "Royalist Counterinsurgency in the Mexican War for Independence: The Lessons of 1811," Hispanic American Historical Review 53 (August 1973): 478.

<sup>30</sup> Morelos á Trujano, Tehuacán, 30 de septiembre de 1812, *Colección de Documentos*, vol. 4, no. 120, p. 487.

supply the needs of the rebel armies. However, he went on to note that some misguided elements willfully exceeded the limits of this mandate and wrongfully laid hold of properties owned by creoles. Attempting to reconcile the divergent interests of New Spain's mixed population, Morelos explained that power had fallen out of the hands of "los Europeos" and had become the responsibility of the creoles. Since the creoles acted first to resist the perfidy of the gachupines, they merited "our Gratitude" and not the hatred that some had connived to ferment against them. Whatever distinction of "quality" that might separate the peoples of Mexico, Morelos reasoned, "we are all Americans." Morelos grounded this assertion in the infallible will of "Divine Law."<sup>31</sup> Yet, the fine distinction which accorded equality among all Americans but nevertheless reserved a leading role in society for the creoles failed to curb depredations against their lives and property.

The need to provide sufficient supplies to maintain the rebel troops led to the creation of other equally ambiguous and unenforcible policies. In one case, rebel leaders attempted to draw a distinction between the properties of loyal and "unnatural creoles." On the one hand, the insurgent leaders barred their followers from forcibly confiscating properties in the possession of creoles loyal to the rebel cause. Yet, in instances where creoles were reluctant to make sufficient voluntary contributions and thereby to prove their

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<sup>31</sup> Bando del Sr. Morelos sobre embargos de bienes de europeos y otras materias de buen gobierno, Teipan, 13 de octubre de 1811, *Colección de Documentos*, vol. 3, no. 95, pp. 401-402.

fidelity, direct action could be taken to apprehend whatever goods were required by the rebel forces.<sup>32</sup>

Such a policy could be and was abused regularly. All rebel leaders, from Morelos down to the most obscure cabecilla, needed to find some way to assure the loyalty of the troops who formed the basis of their power. Patronage and booty provided the key.<sup>33</sup> For example, after having captured Oaxaca on 12 November, 1812, Morelos rewarded Fray José Antonio Talabera in recognition of his loyal service through several actions of war as Mariscal de Campo with a "usurped rancho" situated within the province.<sup>34</sup> However, patronage of this sort secured only the direct relationship between individual leaders and followers and did not guarantee continued loyalty further down the chain of command. Restrictions established to protect creole properties meant little to the local or even regional cabecillas whose immediate objective was to maintain their followers and to increase their numbers. To accomplish this end, cabecillas used whatever wealth was available, including creole properties. In the process, conflicts arose between insurgent leaders over the question of what property could be used to provide for followers. Rebel leaders who claimed supreme power - as did both Morelos and Rayón - condemned the seizure of creole properties as blatant insubordination and established harsh penalties for those

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<sup>32</sup> Coronel Antonio Vargas á [Morelos ?], Taxco, 17 de marzo de 1812, *Colección de Documentos*, vol. 4, no. 33, pp. 42-43.

<sup>33</sup> Eric Wolf and Edward C. Hansen, "Caudillo Politics: A Structural Analysis," *Contemporary Studies in Society and History* 9 (1967): 173.

<sup>34</sup> AGN: Virreyes, ser. 2, vol. 56, no. 82.

subordinate commanders who permitted their followers to engage in such "crimes" as robbery, murder, and especially the seizure of creole properties.<sup>35</sup> In reality, however, those cabecillas who wished to retain the regional support could not act upon such directives without destroying the basis of their own power.<sup>36</sup>

Not surprisingly, regulations that aimed to reduce the insubordination which plagued the rebel forces failed to eliminate the chaotic disorder characteristic of the insurgency. Rather, they succeeded only in accentuating the regional divisions already present in the rebel camp. The divisions which existed between the senior rebel leaders, Morelos and Rayón particularly, further contributed to their collective inability to overcome insubordination and establish unity within the rebel camp. Indeed, in October, 1812, Morelos complained to Rayón that his inspector, Mariscal Ignacio Martínez, commissioned to observe and aid Morelos' advance toward the province of Veracruz, was actively working to subvert the success of

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<sup>35</sup> Bando del Sr. Liceaga imponiendo penas á los insubordinados, Pátzcuaro, 5 de diciembre de 1812, *Colección de Documentos*, vol. 4, no. 166, pp. 676-677. See also Morelos á Trujano, Tehuacán, 30 de septiembre de 1812, *Colección de Documentos*, vol. 4, no. 120, p. 487; and, Ernesto Lemoine Villacaña, et al., *Morelos su vida revolucionaria a través de sus escritos y de otros testimonios de la época* (México: Universidad Nacional Autónoma de México, 1965), document no. 16, 181.

<sup>36</sup> Wolf and Hansen, "Caudillo Politics," 174-176. According to François Chevalier, if a caudillo is not rich, "he must become rich as soon as possible." Despite the importance of wealth in securing the relationship between leader and follower, Chevalier points out that ties of blood are also significant in acquiring a support base. This, as seen in the case of the Villagrán family, had some importance during the independence period. François Chevalier, "The Roots of Personalismo," ed. Hugh Hamill, *Dictatorship in Spanish America* (New York: Alfred A Knopf, 1965), 40-45. Christon Archer provided detailed tables listing all the Villagrán and Anaya family members active in the insurgency in Huichapán. Archer, "Bandits and Revolution," 87-89.



the operation. According to Morelos, Martínez openly and with malicious satisfaction terrorized populations in the vicinity of "Vera Cruz, Jalapa, Córdoba, Orizaba, and Puebla" thereby driving them away from the rebel cause.<sup>37</sup> In frustration, Morelos wrote to Rayón that "nothing would bear greater witness to our justness and integrity than making an example of [Martínez] through some form of violent punishment."<sup>38</sup> Insubordination, in this case, impacted itself negatively on popular support for the revolution and further worked to strain relations between contending rebel chieftains.

The inability of the rebel leadership to consolidate its control over the atomized insurgency did not diminish the magnitude of the insurgent threat after the fall of Hidalgo. Indeed, insurgent activity threatened to seriously undermine the royalist hold over the colony. In early February, 1812, Viceroy Venegas described the situation of Mexico City as critical:

The capital of México is overrun (sic) by gangs of bandits. They have intercepted communications from every direction, disrupted regular correspondence, and have totally interrupted [shipments of] supplies to the capital.<sup>39</sup>

Furthermore, according to Venegas, hostilities carried out by the Villagrán family in addition to the forces led by el cura José Nopala Correa in the region around Zimapán and Ixmiquílpan located to the

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<sup>37</sup> Villacaña, *Morelos*, document no. 36, pp. 214-216.

<sup>38</sup> Ibid., document no. 35, pp. 212-214.

<sup>39</sup> Orden del Virrey Venegas para que sea atacado el Sr. José M. Morelos, México, 8 de febrero de 1812, *Colección de Documentos*, vol. 4, no. 22, p. 31.

northeast of the capital completely disrupted the flow of goods to and from Querétaro, the principal entrepôt between central and northern New Spain. Constant insurgent attacks on royalist convoys cut off the supply of mercury and gunpowder to the mining regions of the north. The valuable mines of the colony, consequently, sank into a state of irreparable decay.<sup>40</sup>

With the passage of a year, the situation remained virtually unchanged. In March, 1813, the new viceroy, Félix Calleja, reported to the Minister of War that insurgent activities both in the Bajío provinces of the interior and in Veracruz so disrupted communications with the capital that a lone courier depending on guile and secrecy stood a better chance of passing through rebel controlled areas than a large convoy with a redoubled escort.<sup>41</sup> Despite royalist success in defeating the insurgency in Texas, Chihuahua, and the other far northern provinces, in addition to parts of Nueva Galicia, few supplies could be moved from such areas to relieve the capital.<sup>42</sup> Commerce, industry, and agriculture, languished in a state of ruin. Even as late as 31 October, 1816, Viceroy Juan Ruíz de Apodaca admitted that the guerrillas operating in the region between León and Pénjamo in western Guanajuato severely disrupted local agriculture and commerce. The rebels burned towns and haciendas causing a dramatic depopulation of the region. The

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<sup>40</sup> Ibid., 32.

<sup>41</sup> Calleja al Ministro de Guerra, México, 15 de marzo de 1813, AGN: Virreyes, ser. 1, vol. 268-A, no. 1.

<sup>42</sup> Ibid.

insurgents established a kind of "blockade" against those haciendas and ranchos which remained productive and prevented crops and livestock from reaching the beleaguered urban centers held by the royalists.<sup>43</sup> In this strained situation the public began to lose confidence in the government. Moreover, the crisis imposed by the rebels in the province of Veracruz, according to Venegas, even led some foreign governments to believe that the cause of Spain in Mexico was lost.<sup>44</sup>

Reacting to the insurgency, the viceregal authorities initially sought to terrorize the population into submission. General José de la Cruz, commander of the army sent by Venegas to pacify the region between the capital and Querétaro, used the first conscious policy of terror in order to root out the rebels led by the Villagrás. Cruz arrived in the town of Huichapán, an entrenched center of insurgent activity, on 21 November, 1810. Confronted by the sizable army led by Cruz, local residents submitted without further resistance. Finding large quantities of goods looted from government convoys, Cruz rejected the "sweet but false demeanor" of the townsfolk and began to implement his terror campaign with methodical vigor.<sup>45</sup>

According to Alamán, many in the region took up the offer of amnesty made by Cruz. Yet, finding that most later returned to the side of the insurgents, Cruz ordered his troops to completely disarm

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<sup>43</sup> Virrey Apodaca al Ministro de Guerra, México, 31 de octubre de 1816, AGN: Historia, vol. 152, sec. 2, no. 1, fol. 111.

<sup>44</sup> Orden del Virrey Venegas para que sea atacado el Sr. José M. Morelos, México, 8 de febrero de 1812, *Colección de Documentos*, vol. 4, no. 22, p. 32.

<sup>45</sup> Quoted in Archer, "Bandits and Revolution," 75.

the region. Royalist troops seized all manner of weapons including simple household cooking knives.<sup>46</sup> Seeking to intimidate the disloyal inhabitants of the region, he also ordered that all executions and other punishments be carried out publicly so as to "take advantage of terror and to animate the residents to remain loyal to the king by showing them the consequences of not doing so."<sup>47</sup> As further proof of his willingness to use extreme measures to restore order, Cruz burned the villages of San Miguelito and San Francisco to the ground in order to set a "healthy example" for the other inhabitants of the region. Preparing for his departure from Huichapán to unite with the Calleja's Army of the Center and converge on Hidalgo's position in Guadalajara, Cruz raised three *destacamentos volantes* (flying detachments) to maintain the peace in his absence. Extraordinary taxes and forced loans provided the finances necessary to maintain these units which continued Cruz's policy of terror by conducting bloody periodic sweeps through the countryside.<sup>48</sup>

After the defeat of Hidalgo at Calderón, Cruz took command over Nueva Galicia and established himself as a virtual "viceroy" in Guadalajara.<sup>49</sup> Continuing his terror strategy, on 25 February, 1811, Cruz ordered Brigadier Rosendo Porlier to advance with a strong force into southern Jalisco in order to pacify the rebellious towns in

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<sup>46</sup> Alamán, *Historia de Méjico* 2: 52.

<sup>47</sup> Quoted in Archer, "Bandits and Revolution," 77.

<sup>48</sup> Ibid., 75-77.

<sup>49</sup> Luis Pérez Verdía, *Apuntes históricos sobre la guerra de independencia en Jalisco* (Guadalajara: Ediciones I.T.G., 1953), 57.

the vicinity of Zacoalco, Sayula, and Zapotlán.<sup>50</sup> In this same region four months previously the rebel commander José Antonio Torres won a decisive victory over a royalist force commanded by Tomás Ignacio Villaseñor. Thereafter, the region remained a hot bed of rebellion.<sup>51</sup> Cruz gave Porlier explicit orders to attack and destroy all insurgent gangs in the region.<sup>52</sup> Drawing Porlier's attention to the tactics practiced by the rebels, Cruz advised him that "you will likely find nothing but the footprints of the fugitives should they get word that you are drawing near."<sup>53</sup> To counter this tactic, Cruz put Coronel Manuel del Río of the Battalion of Guadalajara and the previously defeated Villaseñor at the disposal of Porlier so that he might draw upon their familiarity with the local terrain and customs in order to root out determined pockets of resistance.<sup>54</sup>

Throughout the campaign, Cruz urged his subordinate continuously to "spare no [rebel] that comes within your grasp."<sup>55</sup> Porlier, for his part, assiduously carried out his charge. The small towns through which he passed in pursuit of the fleeing rebel forces

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<sup>50</sup> José de la Cruz á Rosendo Porlier, Guadalajara, 25 de febrero de 1811, *Colección de Documentos*, vol. 3, no. 5, pp. 223-224.

<sup>51</sup> Verdía, *Apuntos históricos*, 20-21.

<sup>52</sup> José de la Cruz á Rosendo Porlier, Guadalajara, 25 de febrero de 1811, *Colección de Documentos*, vol. 3, no. 5, p. 224

<sup>53</sup> Cruz á Porlier, Guadalajara, 28 de febrero de 1811, *Colección de Documentos*, vol. 3, no. 7, p. 225.

<sup>54</sup> Cruz á Porlier, Guadalajara, 25 de febrero de 1811, *Colección de Documentos*, vol. 3, no. 5, p. 224

<sup>55</sup> Cruz á Porlier, Guadalajara, 5 de marzo de 1811, *Colección de Documentos*, vol. 3, no. 11, p. 231.

became the scenes of bloody mass executions. Individuals suspected of being rebel leaders received summary death sentences.<sup>56</sup> Typically, prisoners were hung and then beheaded. In order to remind local inhabitants of the fate that awaited them if they continued to resist, troops mounted the gory trophies on stakes situated at the most travelled points in the towns and along the roads.<sup>57</sup> One Indian resident of Zacoalco, José Bonifacio, received a sentence of two years in a presidio for having been caught with a simple club.<sup>58</sup> Others merely suspected of being sympathetic to the rebel cause could expect to feel the bite of fifty lashes.<sup>59</sup> Upon being recalled to Guadalajara in mid-March, Porlier raised 300 mounted troops at Colima in the extreme south of Jalisco and placed this force under the direction of Coronel del Río. This *destacamento volante* continued the policy of terror once Porlier's main force returned to Guadalajara.<sup>60</sup>

Such terror tactics became common practice on both sides in what was developing into a war to the death. Yet, the brutality of the

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<sup>56</sup> See, for examples, lists of rebels captured and punished by Porlier at Sayula. Submitted to Cruz by Porlier on 2 March 1811. Porlier á Cruz, Sayula, 2 de marzo de 1811, *Colección de Documentos*, vol. 3, no. 9, pp. 227-228.

<sup>57</sup> Extracto de las sentencias pronunciadas por la Junta de Seguridad de Guadalajara, Guadalajara, 17 de marzo de 1811, *Colección de Documentos*, vol. 3, no. 27, p. 267.

<sup>58</sup> Porlier á Cruz, Sayula, 2 de marzo de 1811, *Colección de Documentos*, vol. 3, no. 9, p. 221.

<sup>59</sup> Porlier á Cruz, Sayula, 4 de marzo de 1811, *Colección de Documentos*, vol. 3, no. 12, p. 234.

<sup>60</sup> Cruz á Porlier, [Colima?], 11 de marzo de 1811, *Colección de Documentos*, vol. 3, no. 18, 255. See also, *Colección de Documentos*, vol. 3, no. 19, pp. 256-257.

terror policy worked too well. Rather than pacifying the population it tended to drive its victims further into the arms of the rebellion.<sup>61</sup> In a climate of ever growing fear, whole towns, women and children included, fled before the advancing royalist armies. The precipitous flight of communities, however, led the royalists to assume that villagers were guilty of sympathizing with if not actively supporting the insurgents.<sup>62</sup> The terror policies pursued by officers such as Cruz forced populations to turn to the rebels for protection.

Early in the course of the conflict, Venegas perceived that such tactics produced a negative effect on the royalist pacification effort. On 28 November, 1810, in response to Calleja's draconian treatment of Guanajuato after the expulsion of Allende, Venegas urged Calleja "not to reject completely the principles of humanity" in the treatment of populations that previously supported the rebellion.<sup>63</sup> Tempering his revenge against the urban poor of Guanajuato that had participated in the sack of the city during Hidalgo's occupation, Calleja published an amnesty on 29 November.<sup>64</sup> However, the failure of royalist troops to wrest both territory and populations from insurgent control undermined the effectiveness of the official policy of clemency. In July of 1812, for example, Indians amnestied at Apozolco in the jurisdiction of Colotlán in the border area

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<sup>61</sup> Archer, "Bandits and Revolution," 77.

<sup>62</sup> Porlier á Cruz, Zacoalco, 28 de febrero de 1811, *Colección de Documentos*, vol. 3, no. 8, p. 226.

<sup>63</sup> Venegas á Calleja, México, 28 de noviembre de 1810, *Colección de Documentos*, vol. 4, no. 162, p. 673.

<sup>64</sup> Alamán, *Historia de Méjico* 2: 45.

separating Guadalajara and Zacatecas, reneged on their promise not to take up arms against the forces of the crown. They fled into the nearby sierras where they joined forces with an insurgent gang. Subsequently, this combined force ransacked several ranchos in the area.<sup>65</sup> The royalists, for the most part in control of the major cities, needed to establish a permanent armed presence in the countryside so that regions could be gradually cleared of guerrilla elements.<sup>66</sup>

On 8 June 1811, Calleja enunciated the basis for a counterinsurgency policy that the royalist armies used throughout the remainder of the war. The *reglamento militar* that he recommended to Venegas recognized two fundamental limitations facing the royalist armies. In the first instance, the royalists could not conceivably garrison every town and rural district in New Spain. Nor could they, on the other hand, afford to chase down and destroy every existing insurgent band. Calleja concluded that the solution was to garrison strategic points from which mobile columns could pursue rebel gangs without resorting to "long marches" which only reduced the fighting ability of the troops.<sup>67</sup> In order to fill in the gaps left by the selective garrisoning of regular troops, rural towns and haciendas became responsible for their own self-defense. Ideally, permanent irregular units consisting of one hundred local

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<sup>65</sup> José Blas de Guervara á Cruz, Hostotipaquillo, 5 de julio de 1812, *Colección de Documentos*, vol. 4, no. 98, pp. 394-395.

<sup>66</sup> Eric Van Young, "Islands in the Storm: Quiet Cities and Violent Countrysides in the Mexican Independence Era," *Past and Present* 118 (1988); Hamnett, *Roots of Insurgency*, 66-67.

<sup>67</sup> Calleja á Venegas, Aguascalientes, 8 de junio de 1811, *Colección de Documentos*, vol. 3, no. 44, p. 289.



citizens would protect each town within the militarized zones established by the royalist armies. Each hacendado was likewise called upon to raise a force of fifty dependents. Calleja argued that these forces should not act exclusively in self-defence in the face of marauding insurgent bands, but that they should patrol the roads and territories of individual districts. On daily missions, suspicious outsiders should be apprehended and questioned thereby providing advance intelligence on the activities of enemy forces. With such information, the regular troops - the *destacamentos volantes* - could relentlessly pursue the enemy driving them out of an ever expanding zone of royalist control.<sup>68</sup> By strictly adhering to this plan, the royalists hoped to guarantee the security of the populace of rural New Spain and thereby reduce the popular base of the insurgency.<sup>69</sup>

A number of factors, however, limited the practical effectiveness of the Calleja's *reglamento*. First, some regions simply did not possess sufficient populations to maintain such an elaborate and expensive defense structure.<sup>70</sup> The authorities did not overlook this factor and attempts were made to determine the numbers of

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<sup>68</sup> Ibid., 289-290.

<sup>69</sup> Brian Hamnett, "Royalist Counterinsurgency and the Continuity of Rebellion: Guanajuato and Michoacán, 1813-1820," Hispanic American Historical Review 62 (1): 24.

<sup>70</sup> Christon Archer, "La Causa Buena : The Counterinsurgency Army of New Spain and the Ten Years' War," ed. Jaime E. Rodríguez O, *The Independence of Mexico and the Creation of the Nation* (Los Angeles: UCLA Latin American Center Publications, 1989), 97.

able bodied men available to participate in local defense.<sup>71</sup> Where populations were physically and financially incapable of maintaining self-defense forces, some royalist commanders, such as Agustín de Iturbide, attempted to concentrate dispersed populations inside zones already effectively held by the royalists.<sup>72</sup>

Although resettled villagers added to the number of bodies available for service, this did not necessarily improve the fighting ability of the self-defense forces. Despite the daily training that local militias were supposed to receive, their martial ability remained suspect - particularly when they faced numerically superior rebel forces. The urban company that protected San Felipe, as seen earlier, easily succumbed to the much larger force led by Rafael Nuñez in December, 1811.<sup>73</sup>

The royalist strategists did not expect local defense units to bear the brunt of rebel attacks. The constant patrolling carried out by detachments from the regular garrisons was supposed to reduce the incidence of such attacks. The number of troops available for service in the garrisons increased after Calleja broke the siege at Cuautla (19 February to 2 May 1812) and the Army of the Center was divided. The bulk of these troops were deployed as garrison forces in the interior provinces north of the capital.<sup>74</sup> Although the

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<sup>71</sup> Circular á los subdelegados, previniéndoles remitían una noticia de las compañías de milicia urbana que existían en su territorio, José de la Cruz, Guadalajara, [?] de enero de 1812, *Colección de Documentos*, vol. 4, no. 18, p. 23.

<sup>72</sup> Hamnett, "Royalist Counterinsurgency," 37.

<sup>73</sup> Tovar á Venegas, San Luis Potosí, 31 de diciembre de 1811, *Colección de Documentos*, vol. 3, no. 126, p. 526.

<sup>74</sup> Alamán, *Historia de Méjico* 2: 177-180.

practice of stationing troops at strategic points was fundamental to the overall counterinsurgency strategy, it also proved to be a constant source of irritation and anxiety for Calleja during his tenure as viceroy. In March, 1813, Calleja complained that the army in New Spain had been fruitlessly divided into a multitude of "useless small units."<sup>75</sup> Later that year in September, Calleja wrote to the Minister of War stating frankly that "the dissolution of the Army of the Center . . . produced many evils not the least of which was the destruction of previously excellent cavalry units . . . which [were] now dispersed throughout all the provinces."<sup>76</sup>

Left in isolation, these units degenerated. Garrisons stagnated and the morale of the troops fell as their weapons, uniforms and other equipment deteriorated. Garrison commanders lost control over discipline within their units. In disgust, Calleja vowed to "reanimate" these units so that they might fulfill the roles assigned to them in his counterinsurgency plan.<sup>77</sup> In October, 1813, he issued new regulations concerning discipline within the garrisons. Soldiers were instructed on proper behavior in the "streets and in the shops" of towns under their protection. Any man found guilty of committing a crime against local citizens faced severe penalties. The offending soldier did not face punishment alone. The new regulations created a

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<sup>75</sup> Calleja al Ministro de Guerra, México, 15 de marzo de 1813, AGN: Virreyes, ser. 1, vol. 268-A, no. 1.

<sup>76</sup> Calleja al Ministro de Guerra, México, 5 de septiembre de 1813, AGN: Virreyes, ser. 1, vol. 268-A, no. 14.

<sup>77</sup> Ibid.

tiered system of responsibility and unit leaders and garrison commanders faced disciplinary action if soldiers within their units committed offenses.<sup>78</sup> Still, Calleja's efforts produced only limited results and royalist garrisons continued to suffer from poor morale and desertion.<sup>79</sup>

The counterinsurgency regime, however, did not fail completely. Indeed, it gradually forced the rebels to abandon their roving tactics in the open spaces of the Bajío and other persistent regional foci of insurgency.<sup>80</sup> In response to the missions carried out by the *destacamentos volantes* - directed in the later stages of the war to effect a policy of "continuous pursuit" - the rebels increasingly moved into the inaccessible peripheral areas that straddled the borders separating zones of royalist control.<sup>81</sup> Counterinsurgency commanders anticipated this response. Indeed, having marginalized the insurgent forces into peripheral zones where they were cut off from the resource base that they previously enjoyed in the rich agricultural areas of the Bajío, commanders such as Agustín de Iturbide planned to surround and deal the rebels a decisive blow knocking them out of the war.<sup>82</sup>

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<sup>78</sup> Virrey Félix Calleja, México, 24 de octubre de 1813, AGN: Bandos, vol. 27, no. 110, fol. 130.

<sup>79</sup> Calleja al [Ministro de Guerra ?], México, 11 de marzo de 1815, AGN: Bandos, vol. 28, no. 28, fol. 39.

<sup>80</sup> Archer, "'La Causa Buena'," 93.

<sup>81</sup> Apodaca al Ministro de Guerra, México, 30 de noviembre de 1816, AGN: Historia, vol. 152, sec. 2, no. 5.

<sup>82</sup> The principal difficulty facing Iturbide in pursuit of this plan was securing the cooperation of his fellow counterinsurgent commanders who, as Brian

Entrenching themselves in marginal zones, the rebels proved difficult to dislodge. The rebel fortifications located on the Island of Mezscala in Lake Chapala located south of Guadalajara provide the most striking example of rebel endurance.<sup>83</sup> The rebels first fortified the island in December 1812. Until November, 1816, the insurgent defenders, described by Viceroy Calleja as consisting of nothing more than "six hundred poorly armed Indians," successfully resisted the persistent efforts of José de la Cruz to reduce the island.<sup>84</sup> After raising the island's fortifications, Viceroy Apodaca established a prisoner of war presidio to prevent the rebels from resuming their former positions.<sup>85</sup>

The task of reducing rebel hard points became an intractable problem that vexed Calleja throughout the duration of his service in New Spain. On a general level, the continued presence of a strong disciplined insurgent army south of Mexico City unified under the direction of Morelos placed conflicting demands on the limited resources available to the forces of the crown. Consequently, counterinsurgency forces charged with rooting out rebel strongholds

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Hamnett pointed out, "attended strictly to [their] own sphere[s] of command." Hamnett, "Royalist Counterinsurgency," 30-31, 37.

<sup>83</sup> Other rebel fortifications which proved difficult to subdue include, for example, those at el Puerto de Bocaquilla de Piedras in Nuevo León and el Cerro Colorado. See Apodaca al Ministro de Guerra, México, 31 de diciembre de 1816, AGN: Historia, vol. 152, sec. 2, no. 8, fol. 128; and, Apodaca al Ministro de Guerra, México, 31 de enero de 1817, AGN: Historia, vol. 152, sec. 2, no. 9, fol. 135.

<sup>84</sup> Calleja al Ministro de Guerra, México, 5 de septiembre de 1813, AGN: Virreyes, ser. 1, vol. 268-A, no. 16; and, Apodaca al Ministro de Guerra, México, 31 de julio de 1818, AGN: Historia, vol. 152, sec. 18, no. 58, fols. 351.

<sup>85</sup> Apodaca al Ministro de Guerra, México, 31 de julio de 1818, AGN: Historia, vol. 152, sec. 18, no. 58, fols. 351-353.

did not always receive priority consideration. So long as Morelos led a sizeable force of rebels, defending the capital remained the premier concern of Calleja. Even Calleja's victory at Cuautla (May 1812) failed to eliminate Morelos as a factor in the war. Morelos, having broken free of the royalist siege, escaped to the south where he conquered the rich province of Oaxaca (25 November 1812). Here, the insurgent priest marshalled his forces for a renewed assault on the capital. In March 1813, Calleja informed the Minister of War that since the siege of Cuautla, Morelos had succeeded in raising an imposing army which ranged in size from four to six thousand well armed troops. Seventy pieces of artillery captured from the royalists or forged by the rebels themselves further augmented the rebel threat.<sup>86</sup>

Calleja responded by deploying two army groups south of the capital. According to his report to the Minister of War dated 5 September, 1813, Calleja positioned "slightly more than one thousand men" in the area between Taxco and Tepecuacuilco in the southern tierra caliente under the command of Brigadier José Moreno Daoiz. Calleja directed the other, a force of two thousand under the direction of Coronel José Gabriel de Armijo, to take up positions in the area between Cuautla and Izucar to the south of Puebla. In order to break the hold of Morelos over Oaxaca and the region surrounding Acapulco, these units were to operate either independent of one another or in direct cooperation as the circumstances merited.

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<sup>86</sup> Calleja al Ministro de Guerra, México, 15 de marzo de 1813, AGN: Virreyes, ser. 1, vol. 268-A, no. 1.

Constant summer rains and intense heat, however, frustrated the immediate execution of Calleja's plans.<sup>87</sup>

On 20 August, 1813, Acapulco fell to the Morelos. The news of the capitulation of the fortress San Diego left Calleja momentarily unnerved. This single event, Calleja informed his superiors in Spain, had "so changed the aspect of the war as to undermine all my plans."<sup>88</sup> Calleja feared that, from combined positions in Acapulco and the rich province of Oaxaca, Morelos would be able to begin a successful campaign against the capital.<sup>89</sup> However, the viceroy's concern was either greatly exaggerated or misplaced. The long siege of Acapulco, which began in April 1813, exhausted the Morelos' insurgent troops while simultaneously allowing Calleja to regroup his own forces. Brian Hamnett has gone so far as to suggest that Morelos' preoccupation with Acapulco over other more strategically significant targets such as Puebla and Vera Cruz represented a "symptom of defeat" rather than a "triumphant new offensive."<sup>90</sup> In December 1813, the combined force of Coronels Agustín de Iturbide and Ciriaco de Llano decisively defeated Morelos in his bid to capture Valladolid.<sup>91</sup> Seeming to recover from this loss, Morelos regrouped

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<sup>87</sup> Calleja al Ministro de Guerra, México, 5 de septiembre de 1813, AGN: Virreyes, ser. 1, vol. 268-A, no. 19.

<sup>88</sup> Calleja al Ministro de Guerra, México, 3 de octubre de 1813, AGN: Virreyes, ser. 1, vol. 268-A, no. 21.

<sup>89</sup> Ibid.

<sup>90</sup> Hamnett, *Roots of Insurgency*, 170.

<sup>91</sup> Alamán, *Historia de Méjico* 4: 11-15.

his scattered forces. On 3 January 1814 at Puruarán, however, the royalists once again smashed the rebel army.<sup>92</sup>

This defeat is commonly regarded as a watershed marking the downfall of Morelos.<sup>93</sup> After Puruarán and through the course of the next two years, the political and military authority of Morelos gradually diminished.<sup>94</sup> By diverting resources away from the counterinsurgency pacification plan, the royalists successfully contained the threat presented by the more disciplined and organized forces of Morelos. In December of 1815, the royalists captured and subsequently executed Morelos. After his death, no other rebel leader could muster the unity necessary to lead a concerted rebel challenge against the capital. The effort engineered by Morelos to reassert a revolution over the unorganized insurgency failed.<sup>95</sup>

Despite the fall of Morelos, the insurgency remained entrenched around the numerous hard defensive points created by the remaining rebels in the Bajío, the tierra caliente to the south and west of the capital, and in the province of Veracruz. Taking over from Calleja in September 1816, Viceroy Apodaca reported to the Minister of War that rebel fortifications continued to pose problems for the troops of the crown. From these defensive positions, the

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<sup>92</sup> Ibid., 16

<sup>93</sup> José Bravo Ugarte, *Historia sucinta de Michoacán* 3 vols. (México: Editorial Jus, S. A., 1962), vol. 3, p. 49.

<sup>94</sup> Calleja al Ministro de Guerra, México, 25 de marzo de 1814, AGN: Virreyes, vol. 268-A, ser. 1, no. 31.

<sup>95</sup> Anna, *The Fall of the Royal Government*, 180.



rebels raided towns and harassed the royalist lines of communications and supply.<sup>96</sup> During his years of service, Calleja could not guarantee the security of pacified areas which remained targets for the rebels who, practicing a scorched earth policy, methodically strove to burn and destroy all haciendas located with government held territories.<sup>97</sup>

The decentralization of the command structure that developed as a result of the counterinsurgency effort, lay at the root of the royalist army's inability to reduce rebel strongholds. Calleja gave regional commanders considerable independent power in order to encourage the implementation of well measured response which best suited local conditions. However, regional independence also prevented the royalist army from unifying its strength to conduct joint operations against obstinate rebel fortifications. Calleja informed the war minister that individual counterinsurgent commanders preferred to conduct their own operations. Likewise, they tended to monopolize the revenues generated within their own jurisdictions thereby depriving the capital of the resource base it needed to direct a final concerted effort to eliminate continued rebel resistance. The only time the counterinsurgent commanders sought to contact the capital, wrote Calleja, was to ask for more supplies and

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<sup>96</sup> Apodaca al Ministro de Guerra, México, 31 de octubre de 1816, AGN: Historia, vol. 152, sec. 2, no. 1, fol. 113.

<sup>97</sup> Liceaga á Joaquín Caballero, Santa Monica, 25 de diciembre de 1812, *Colección de Documentos*, vol. 4, no. 183, p. 704.

money.<sup>98</sup> Internecine struggles between regional authorities slowed the progress of Calleja's plan to pacify the colony.<sup>99</sup>

The task of pacifying New Spain after the defeat of Hidalgo presented monumental problems for the viceregal authorities. During the first stages of the war, Hidalgo and his enormous rebel army occupied the greater part of the royalist war effort. Many less significant independent rebel cabecillas nominally aligned with Hidalgo ranged freely throughout much of the colony in the pursuit of their own ends while the royalists concentrated on defeating Hidalgo and his proposed creole revolution. Having defeated Hidalgo on the battlefield, the royalist army now faced what can be best described as a widespread guerrilla insurgency. To be sure, rebel bands did not suddenly appear on the scene with the disappearance of Hidalgo. Yet, while Hidalgo and his fellow creole leaders tended to dominate so much of subsequent historical thought on the independence war and in so far as Hidalgo's main force represented the principal rebel threat to royal authority, Hidalgo's death seemed to transform the nature of the conflict in New Spain. Now the troops

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<sup>98</sup> Calleja al Ministro de Guerra, México, 5 de septiembre de 1813, AGN: Virreyes, ser. 1, vol. 268-A, no. 19.

<sup>99</sup> In September 1813, Calleja reported to the Minister of War that Cruz had withdrawn forces under his command from the provinces of Guanajuato and Valladolid. Cruz informed the viceroy that defending these two regions from his base in Guadalajara was completely impossible given the vast distances involved, the nature of the terrain, and the numerous obstacles erected by the rebels. The authorities in Guanajuato and Valladolid, on the other hand, bitterly complained to the viceroy about Cruz's decision to pull back his troops into his own territories. In response, Calleja decentralized the command structure even further by placing Coronel Agustín de Iturbide in charge of Guanajuato and by installing Brigadier García Conde at Valladolid. Relations between Calleja and Cruz continued to be strained over questions of how best to conduct the war. See, AGN: Virreyes, ser. 1, vol. 268-A, nos. 11, 16, 19, and 37.

of the crown had to defeat an enemy that consistently refused to engage the royalists in open pitched battles. Preferring hit and run tactics, the rebels disrupted agriculture, trade, and commerce by capturing and burning haciendas, interdicting the roads, and by disrupting markets for goods and capital investments. So long as the rebels were able to conduct their guerrilla operations, the ability of the crown to maintain control over New Spain remained in doubt. The complete failure of the rebels to unify their efforts - in part a result of the individual commander's need to accumulate wealth to maintain his followers - provided the only small consolation to the royalist authorities.

The initial response of the crown to the insurgency manifested itself in the terror policies pursued by such officers as José de la Cruz, first in Huichapán to the north and east of the Mexico City and then in Nueva Galicia. Royal vengeance sparked acts of counter-terror. Without destroying the rebel bands completely, the royalists could not pacify the various regions in the grasp of the insurgents. However, terror by itself tended to drive populations to seek out the protection of the rebels and was, consequently, a tool of only limited value in the effort to pacify New Spain. Yet, other aspects of the terror policy established by Cruz, such as the *destacamentos volantes*, proved to have enduring value and were incorporated into counterinsurgency plan developed by Félix Calleja in June, 1811.

Calleja's counterinsurgency plan offered a comprehensive response to the rebel threat. It militarized society arming the people to fight in their own self-defense. Since the crown lacked the resources to protect every population center or to root out every

guerrilla band, Calleja could not avoid this potentially dangerous measure. Zones of royalist control were created by sweeping clear rebel bands through the use of mobile columns of mounted cavalry and dragoons. The objective was to marginalize the rebels to the point where they could be defeated easily in decisive confrontations. Despite the sound theoretical basis of Calleja's plan, other factors prevented it from being successfully implemented. Large concentrations of rebel forces coexisted with the numerous smaller bands of guerrillas - the real basis of the insurgency. The larger concentrations of rebels led by Morelos and Rayón, for example, required the authorities to divert limited resources away from Calleja's pacification plan. The goal of liberating farflung territories from rebel control occupied a secondary position, for the time being, relative to the urgent necessity of preventing the rebels from capturing Mexico City. The royalists had to prevent the rebels from converting the insurgency into a full scale revolution.

By defeating Morelos, the royalists successfully forestalled the resurgence of a unified revolutionary movement during the remainder of the independence period. Yet, the insurgency remained entrenched in several persistent regional foci; the counterinsurgency regime created by Calleja did not defeat the rebels in New Spain but merely contained them. Its heavy dependence on garrisons undermined the integrity of the royalist army. Discipline declined and morale lagged. The decentralization of authority inherent in the counterinsurgency plan, moreover, diminished the capacity of the army to react coherently to the dispersed rebel threat. Royalist commanders attended to their own immediate concerns without

sufficient regard for the overall plan pursued by the viceroy. Joint operations against the rebel strongholds established in the inaccessible marginal zones, such as the mountainous border between Zacatecas and Guanajuato and the jungles of Veracruz, suffered as a result. Having cleared some areas from direct rebel control, the royalists could not guarantee the maintenance of their security in light of the continued raiding carried out by the rebels from their isolated fortresses. Divided at the operational level and lacking resources, the royalists struggled to contain the rebels in their peripheral strongholds and reduce the damage wrought by the insurgency. Their gains were significant, yet, despite claims to the contrary, insurgency persisted beyond the point traditionally regarded as the end of the military phase of the independence period in Mexico: 1816.

### Chapter Three:

#### The Artificial Peace: Royalists, Rebels, and Independence, 1816-1821

Although Viceroy Félix María Calleja failed to crush the insurgency completely, he is traditionally credited with being the greatest champion of continued Spanish rule in New Spain during the independence period. Praising Calleja, Lucas Alamán asserted that:

If Spain had not lost its dominion over these countries by later events, Calleja would have been recognized as the reconqueror of New Spain and the second Hernán Cortés.<sup>1</sup>

Calleja broke the back of the revolution for independence by implementing a counterinsurgency strategy which relied on fixed garrisons, mobile columns, and an armed civilian population.<sup>2</sup> With Hidalgo long dead and Morelos recently captured and executed, no single leader emerged to revive what was fast becoming an atomized insurgency. From 1816 on, the insurgents remained divided among themselves. Jealous of their individual power, rebel cabecillas defied

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<sup>1</sup> Lucas Alamán, *Historia de Méjico* 5 vols. 2d ed. (México: Editorial Jus, S. A., 1968), vol. 4, p. 308.

<sup>2</sup> On Calleja's counterinsurgency policy, see, Brian Hamnett, "Royalist Counterinsurgency and the Continuity of Rebellion: Guanajuato and Michoacán, 1813-1820," Hispanic American Historical Review 62 (1): 19-48. Anna argues that after the fall of Morelos there existed little or no hope for an insurgent victory. See Anna, "The Last Viceroys of New Spain and Peru: An Appraisal," American Historical Review 81 (1): 41.

all attempts to recast the energies of the insurgency into a new revolutionary thrust against the royalist authorities.<sup>3</sup>

Although the rebels were unable to mount a renewed revolutionary drive, the royalists experienced profound difficulties in rooting out the remainder of the insurgent forces. The decentralization in command structures inherent in Calleja's counterinsurgency program, contrary to its original purpose, worked against the speedy resolution of the conflict. The war dragged on as individual royalist commanders pursued their own ends within their separate districts of command.

Despite his success, Calleja began to lose the support of New Spain's colonial elite after 1815. Tiring of the war, elite creole and Spanish supporters of the royalist regime misconstrued the decline of the revolutionary threat posed by the rebels as the conclusion of the military struggle itself.<sup>4</sup> Resident peninsular merchants, for example, greeted the respite won over the rebels as an opportunity to reassert their control over the colony's overseas trade.<sup>5</sup> Accepting the idea

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<sup>3</sup> In a case reminiscent of Rayón's attempt to assert his authority over Albino García in the Bajío, the Junta of Juajilla, in 1817, sought to assert its supremacy over El Padre Miguel Torres who, like García, successfully resisted these efforts to curb his individual authority. Brian Hamnett, *Roots of Insurgency: Mexican Regions, 1750-1824* (Cambridge: Cambridge University Press, 1986), 187.

<sup>4</sup> Brian Hamnett, "Mexico's Royalist Coalition: The Response to Revolution, 1808-1821," *Journal of Latin American Studies* 12 (1980): 73. The overriding sense among elite contemporaries that the destruction of Morelos marked an end to the armed conflict in New Spain has been carried forward in the works of many more recent historians. Timothy E. Anna, *The Fall of the Royal Government in Mexico City* (Lincoln, Nebraska: University of Nebraska Press, 1978), 180-181.

<sup>5</sup> Over the course of the war, foreigners gained control of nearly fifty per cent of New Spain's overseas trade. See, Romeo Flores Caballero, *Counterrevolution: The Role of the Spaniards in the Independence of Mexico, 1804-1838*, trans.,

that the insurgents were defeated militarily, other royalist partisans anticipated a speedy return to normalcy and prosperity. More specifically, elite backers of the regime expected Calleja to curb his demands for patriotic contributions. Faced with a burgeoning domestic debt, elite enthusiasm for the war waned in direct proportion to the expenses incurred against their estates.<sup>6</sup>

However, Calleja recognized that the defeat of Morelos did not represent a final royalist victory or even the start of a lull in the war. Seizing the initiative, he redirected resources and men previously devoted to the campaign against Morelos into his counterinsurgency program.<sup>7</sup> In a word, Calleja braced himself for a final push against the rebels. Far from scaling down the intensity of the conflict, Calleja demanded even greater efforts in order to defeat those insurgents that had entrenched themselves in the remote areas of Guanajuato, Michoacán, the tierra caliente, and Veracruz.<sup>8</sup>

Predictably, Calleja's determination to intensify the war weakened the coalition of elite interests which supported the royalist regime: he broke the back not only of the rebels but of his elite

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Jaime E. Rodríguez O. (Lincoln, Nebraska: University of Nebraska Press, 1974), 56.

<sup>6</sup> The debt accumulated over the course of the first five years of war has been estimated at 50 million pesos. Hamnett, "Royalist Coalition," 74.

<sup>7</sup> In the fall of 1816, in an attempt to placate the competing needs of Guanajuato and Valladolid, on the one hand, and Guadalajara, on the other, Calleja sent to each region convoys containing those provisions necessary to expedite the implementation of his counterinsurgency plan. AGN: Virreyes, series 1, vol. 268-A, nos. 11 and 16.

<sup>8</sup> Brian Hamnett, "Royalist Counterinsurgency and the Continuity of Rebellion: Guanajuato and Michoacán, 1813-1820," Hispanic American Historical Review 62 (1): 37.



supporters as well.<sup>9</sup> Dissatisfied with the viceroy's conduct of the war, members of the colonial elite sought to undermine Calleja's prestige in the court of Ferdinand VII. In correspondence with the king, Bishop Abad y Quiapo argued that the persistence of the rebellion proved that Calleja lacked both the will and ability to pacify the colony.<sup>10</sup> Similarly, the Bishop of Puebla, Antonio Joaquín Pérez, complained that, in the pursuit of unsound military policies which served only to spill "much innocent blood, which could and should have been avoided," Calleja misappropriated funds from several convents in New Spain.<sup>11</sup> Criticisms of this kind eventually deprived Calleja of the opportunity to achieve the final destruction of the rebel threat in New Spain. On 20 September, 1816, Juan Ruíz de Apodaca replaced Calleja as viceroy.

A prominent early Mexican nationalist historian, Lorenzo de Zavala, noted that contemporaries "perceived the arrival of Apodaca as the beginning of a new era."<sup>12</sup> Calleja, a veritable "tiger thirsting for blood . . . a panther determined to wreck destruction," gave way to Apodaca who, in the words of Brian Hamnett, attempted to "kill the revolution [with] kindness."<sup>13</sup> To the war weary elite, Apodaca

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<sup>9</sup> Hamnett, "Royalist Coalition," 71.

<sup>10</sup> Caballero, *Counterrevolution*, 56.

<sup>11</sup> Ibid., 56-57; Hamnett, "Royalist Coalition," 73-74.

<sup>12</sup> Lorenzo de Zavala, *Ensayo crítico de las revoluciones de México desde 1808 hasta 1830* 2 vols., (México: Editorial Porrúa, S.A., 1969), vol. 2, 70.

<sup>13</sup> Carlos María de Bustamante, *Cuadro histórico de la revolución Mexicana*, 3 vols., (México, 1961), vol. 1, 93; Hamnett, "Royalist Coalition," 74.

held out the possibility of reconciliation and reform where Calleja seemed only to provoke further resistance with his sanguinary policies.<sup>14</sup> However, on his departure, Calleja advised his successor to be wary of complacency; he warned Apodaca not to be deceived by any apparent lull in the conflict and to never underestimate "the predisposition of the colonies to emerge from dependency [upon] the metropolis, should the opportunity arise."<sup>15</sup> For Calleja, the insurgency continued as a significant threat and the arrival of Apodaca the peacemaker did not mark the end of the war in New Spain.

Heeding his predecessor's advice, Apodaca continued Calleja's pacification program. However, as a reformer, Apodaca simultaneously attempted to restore the economy to guarantee continued elite support. Moreover, given the endemic nature of the insurgency in some regions and the continued inability of the military to eliminate these foci, Apodaca launched an extensive amnesty policy designed to reconcile rebel hold outs to the inevitability of continued Spanish rule. Apodaca referred to his three fold program as the "plan activo."<sup>16</sup>

Apodaca was confident of success. However, according to Zavala, Apodaca knew by 1820 that the "tranquility of the realm was artificial." Zavala suggested that Apodaca feared losing, "at any

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<sup>14</sup> Anna, "The Last Viceroys," 53-54.

<sup>15</sup> Quoted in Doris Ladd, *The Mexican Nobility at Independence 1780-1826* (Austin: University of Texas Press, 1976), 121.

<sup>16</sup> For Apodaca's use of this term, see, Apodaca al Ministro de Guerra, México, 30 de noviembre de 1816, AGN: Historia, vol. 152, sec. 2, no. 5, fol. 121.

moment," the "fruits of his efforts and all the glory which he had acquired as the *el pacificador* of New Spain."<sup>17</sup> Indeed, from 1816 to 1821, rebels cleared from one area regrouped elsewhere. And, although the number of active insurgents declined, Apodaca could not claim that he had silenced the rural insurgency. Over that same period the royalist army succumbed to exhaustion. Soldiers lost their will to fight and officers developed economic and political interests that were best served by conserving their military strength. The army became a vehicle to attain wealth and influence more than an effective tool of war. By late 1820, both the rebels and the royalists were preoccupied with self-preservation as opposed to absolute victory. Out of the chaos of insurgency, a mercurial new *status quo* began to emerge forming the basis of Mexico's independence. Military power, however ineffectual, became the key to the security of royalist and insurgent commanders and to independence.

At the beginning of Apodaca's tenure in Mexico, few indications existed to suggest that peace had been restored. In September 1816, rebel forces launched a surprise attack on Apodaca's convoy as it made its way from Vera Cruz to the capital. This assault dispelled any illusions that the new viceroy may have held about the supposed moribund state of the insurgency. José Francisco Osorno led an insurgent force out of the Llanos de Apan region situated north and east of the capital and joined with a cavalry detachment sent out by Manuel Terán from his more southerly stronghold at Tehuacán. On 16 September, the combined rebel force fell upon the Apodaca's

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<sup>17</sup> Zavala, *Ensayo crítico* 2: 84.

convoy as it approached the city of Puebla. Inexperienced and totally uninitiated with the guerrilla tactics of the insurgents, Apodaca's escort fared poorly. Surveying his situation, Apodaca abandoned his coach in favor of a speedy mount presumably to ensure his escape in the event of a rebel victory.<sup>18</sup> Lucas Alamán reported, however, that the timely arrival of Coronel Márquez Donallo and the troops of his command spared Apodaca the humiliation of a precipitous flight.<sup>19</sup> From the moment of his arrival, Apodaca was forced to realize that he could not discount the insurgency in the highlands of Veracruz as the trifling residue of a defunct revolution.

Insurgent activities in the Bajío, moreover, demonstrated to the new viceroy that the insurgent threat in the northern provinces continued unabated. In August and September of 1816 rebel forces established fortified points at León and Pénjamo in the border zone separating Guanajuato and Guadalajara. During his final month as viceroy, Calleja had ordered Lieutenant Coronel Pedro Monzalve to clear the rebels from León. Monzalve's initial attack failed leading to the loss of a significant number of officers and troops. Meanwhile, Coronel Francisco Orrantía attempted to dislodge the rebels from Pénjamo. However, rough terrain along with the numerous defenses erected by the rebels, slowed the royalist advance. By the time Apodaca assumed power, Orrantía's offensive had stalled completely. According to the viceroy, the move to clear Pénjamo developed into a

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<sup>18</sup> Bustamante, *Cuadro histórico* 2: 263-264.

<sup>19</sup> Lucas Alamán, *Historia de Méjico* 4: 310-311.

prolonged siege which "was proving ineffective due to the scarcity of troops and resources."<sup>20</sup>

Frustrated by this turn of events, Apodaca reported to the Minister of War that these successive royalist defeats increased insurgent activity in western Guanajuato. With the royalist army in this region gravely overextended and short of both reserves and supplies, the military could not prevent the rebels from taking control over local agriculture and commerce. Using the revenues generated from sequestered haciendas and from attacks on commercial traffic, the insurgents consolidated their hold over León and Pénjamo.<sup>21</sup>

Although many historians have remarked favorably upon Apodaca's indefatigable optimism, the viceroy's initial survey of the state of the war in New Spain betrayed a subdued but nonetheless significant sense of pessimism.<sup>22</sup> At the end of October, 1816, Apodaca informed the Minister of War of the status of royalist pacification efforts in Puebla and Oaxaca. Confidently, Apodaca asserted that "no sizable reunions of rebels [exist] in [these] provinces." However, hedging his estimation of the situation facing the royalist officers operating in the Puebla-Oaxaca region, Apodaca admitted that "numerous [rebel] gangs have coalesced into a

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<sup>20</sup> Apodaca al Ministro de Guerra, México, 31 de octubre de 1816, AGN: Historia, vol. 152, sec. 2, no. 1, fol. 111.

<sup>21</sup> Ibid., fol. 111.

<sup>22</sup> On the optimistic attitude of Apodaca, see, for example: Timothy Anna, "An Essay on the Mexican Viceroys During the War of Independence: The Question of Legitimacy," ed. Peter Gillis, *Historical Papers 1975* (Ottawa: Canadian Historical Association, 1976), 70.

formation worthy of some consideration." His final summation of the state of the war in Puebla and Oaxaca revealed the inability of the royalists to pacify the territories over which they claimed control:

The rebels maintain themselves in military positions at Cerro Colorado in the Province of Puebla and at Silacayuapan, Santa Lucía, and Teotitlán in the Province of Oaxaca. From these points [they] molest organized towns and obstruct the roads which are all but impassible without a competent escort . . . . Despite the fact that our troops pursue the rebels and in general cause them considerable damage, they easily recoup their losses by drawing off the rich resources of the country[side].<sup>23</sup>

Rebels entrenched in such strongholds as Silacayuapan and el Cerro Colorado made a mockery of Apodaca's initial attempts to pacify New Spain. Assessing the significance of the rebel strongholds, the viceroy wrote to the king:

These fortified points are the principal refuge of the [rebel] cabecillas: they provide them with security in addition to repositories for their plunder. From these dens they prey on neighboring haciendas and towns where, as the opportunity arises, they commit predatory assaults and assassinations.<sup>24</sup>

El Cerro de Copóro in southern Michoacán, the refuge of the Rayón brothers since 1814, typified the negative impact of insurgent retreats on the royalist counterinsurgency program. In the areas

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<sup>23</sup> Apodaca al Ministro de Guerra, México, 31 de octubre de 1816, AGN: Historia, vol. 152, sec. 2, no. 1, fol. 114.

<sup>24</sup> Apodaca al Ministro de Guerra, México, 31 de marzo de 1817, AGN: Historia, vol. 152, sec. 2, no. 19, fol. 169.

immediately north and west of the capital, in the valleys of Toluca and Ixtlahuaca, the royalists established defensive zones of fortified villages and haciendas based on Calleja's counterinsurgency program. 'Peace' in these areas led to a slight but valuable recovery in agriculture and trade which augmented the resources available to the viceregal authorities.<sup>25</sup>

However, the rebel forces entrenched at Cerro de Copóro prevented a complete return to normalcy in this region. Ranging out beyond the confines of their fortress, the guerrillas descended into the royalist zones of Toluca and Ixtlahuaca conducting periodic forays in search of supplies. Responding to this situation, Apodaca ordered Lieutenant Coronel Matías Martín y Aguirre to eliminate the destabilizing influence of Copóro. By the end of October, 1816, after several failed attempts to take the rebel position, Apodaca realized that a formal siege of Copóro offered the only solution to the continued problem of rebel depredations against 'pacified' zones. Yet, for such an operation to succeed, the viceroy admitted that Aguirre would require a besieging army of at least 3,000 troops.<sup>26</sup> Unable to assemble so many troops, Apodaca directed Aguirre to harass the forces of the Rayóns whenever they ventured out of Copóro. In this way, the viceroy hoped to starve out those insurgents who remained protected within their isolated stronghold.<sup>27</sup> After a siege of three

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<sup>25</sup> Apodaca al Ministro de Guerra, México, 31 de octubre de 1816, AGN: Historia, vol. 152, sec. 2, no. 1, fol. 113.

<sup>26</sup> Ibid.

<sup>27</sup> Apodaca al Ministro de Guerra, México, 31 de enero de 1817, AGN: Historia, vol. 152, sec. 2, no. 9, fols. 134-135.

months, the royalists finally forced the rebels lodged at Copóro to surrender.<sup>28</sup>

The long resistance of Copóro moved the viceroy to demand that his commanders exert greater efforts to end the war. In late December 1816, Apodaca informed the Minister of War:

I have instructed [my commanders] not to interrupt their pursuit of the rebels for any reason and in general to obtain whatever advantages they can. I have repeated these orders incessantly in order to speed up the pacification [process].<sup>29</sup>

In order to supply his officers with troops fit enough to carry through this general directive, Apodaca rearmed and outfitted several line regiments in the closing months of 1816. Squeezing the limited reserves of the public treasury, he provided the Regiments of Zamora, Savoya, the Dragoon Regiment of Spain, and others, with new uniforms along with "other equipment necessary for active campaigning." He also requested 2,000 replacement troops from Spain to restore the full complement of his regiments. A request to the Spanish Minister of War for 6,000 new muskets rounded out Apodaca's effort to shore up the fighting ability of the royal army.<sup>30</sup>

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<sup>28</sup> Ramón Rayón surrendered to Aguirre on 2 January, 1817, Bustamante, *Cuadro histórico* 2: 756. For the terms of surrender settled upon between Ramón Rayón and Matías Martín y Aguirre, see Apodaca al Ministro de Guerra, México, 5 de febrero de 1817, AGN: Historia, vol. 152, sec. 2, no. 10.

<sup>29</sup> Apodaca al Ministro de Guerra, México, 31 de diciembre de 1816, AGN: Historia, vol. 152, sec. 2, no. 8, fol. 134.

<sup>30</sup> Apodaca al Ministro de Guerra, México, 31 de enero de 1817, AGN: Historia, vol. 152, sec. 2, no. 9, fols. 138-140. The state of finances was such that Apodaca asked the Minister of War not to send a unified regiment to bolster the complement of troops in New Spain. A regiment, with its formalized organizational, staff, and supply requirements, would overwhelm the



Despite ongoing problems of supply and manpower, Apodaca's plan produced noteworthy results.<sup>31</sup> Early in 1817, after the fall of Copóro, the royalist army won a series of victories which gave the impression that the insurgency was gradually being ground into the dust. The reduction of el Cerro Colorado and Tehuacán in the border zone of Puebla on the margins of both Veracruz and Oaxaca - the strongholds of Manuel Terán - represented Apodaca's most important victory after the surrender of Copóro.

Apodaca entrusted the task of reducing the fortifications at el Cerro Colorado and Tehuacán to a combined royalist force from Puebla, Veracruz, and Oaxaca. The preparations of the royalists prompted Manuel Terán to lead his followers out from behind the

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financial capacity of the public treasury. In order to obviate the burden of maintaining an additional regiment, the 2,000 troops that Apodaca requested were to serve within existing units. However, the financial condition of the viceregal regime did not substantially improve. Two years later Apodaca instituted a Commissary of War in Mexico City "in order to economize on spending, improve the supply of necessities to the troops, and tighten up the entire financial organization of the army." Timothy Anna, "Francisco Novella and the Last Stand of the Royal Army in New Spain," Hispanic American Historical Review 51 (1): 94.

<sup>31</sup> Royalist units operating in the field frequently ran short of provisions and war materials. This was especially true in Veracruz. In December 1816, Apodaca complained that the failure of Governor Dávila to provide adequate supplies to the troops operating in the field seriously undermined the integrity of the royalist war effort. The situation had improved little by July 1817 and Apodaca openly accused Dávila of obstructing the progress of the war. In an attempt to rectify this situation, Apodaca relieved Dávila from his posts as both Comandant General and military governor of the province. However, by 1818-19, as Christon Archer observed, Veracruz remained in a state of "administrative chaos." At this point, the subinspector general of the army, Brigadier Marshal Pascual de Liñan, was appointed to restore order. Apodaca al Ministro de Guerra, México, 31 de diciembre de 1816, AGN Historia, vol. 152, sec. 2, no. 8, fols. 128-134; Ibid. no. 24, fol. 188; Archer, "The Young Antonio López de Santa Anna: Veracruz Counterinsurgent and Incipient Caudillo," ed., Judith Ewell and William H. Beezley, *The Human Tradition in Latin America: The Nineteenth Century* (Wilmington, Delaware: A Scholarly Resources Imprint, 1989), 7.

protection of their fortifications in anticipation of the final assaults against Colorado and Tehuacán.<sup>32</sup> Initially, Terán's attempt to disrupt royalist staging points met with some success. However, after three weeks of campaigning, the superior forces of the royal army forced Terán to retreat back to Tehuacán. Besieged by royalist troops under the direction of Coronel Rafael Bracho at the convent of San Francisco, Terán and the 300 men who remained at his side surrendered on 20 January, 1817.<sup>33</sup>

Capitalizing on the propaganda value of his latest victories, ten days later Apodaca triumphantly declared: "The rebellion is over; we are finished, once and for all, with this Hydra."<sup>34</sup> Praising the efforts of the royalist forces, Apodaca exclaimed to the war weary populace of New Spain:

Twelve fortified points, all very important, in addition to many others of lesser significance . . . have been taken from the rebels . . . . Thousands of men corrupted by the rebellion have resumed their obedience to His Majesty and have returned to the fold of their families. These victories are the fruit of your determined labour through these years of hardship.<sup>35</sup>

Despite Apodaca's claim, the insurgency was far from over. To be sure additional victories followed on the heels of Terán's

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<sup>32</sup> Alamán, *Historia de Méjico* 4: 332.

<sup>33</sup> Ibid., 333; For details on the exact days and locations of the exchanges during this campaign, see: Bustamante, *Cuadro histórico* 2: 756.

<sup>34</sup> Bustamante, *Cuadro histórico* 3: 63.

<sup>35</sup> Ibid., 63-64.

surrender. In February 1817, Lieutenant Coronel Patricio López took the rebel fortification at San Esteván in the province of Puebla. Encouraged by this victory, Brigadier Melchor Alvarez intensified his siege of Silacayupan and forced its surrender on 4 March, 1817, after eleven days of fierce resistance.<sup>36</sup> To convince the population of an imminent royalist victory, Apodaca elaborated a serial list of similar royalist successes in the Gazetta de México. While each one may have contributed to the impression that the end of the war was at hand, their propaganda value far outweighed their real importance.

Indeed, as the career of the insurgent Guadalupe Victoria in Veracruz illustrates, no amount of military action could stamp out the insurgency completely. Where the rebels met defeat at one location, the survivors resumed their activities at another. In November of 1816, for example, a concerted royalist assault against the stronghold of Monteblando located near Orizaba forced Victoria to retreat from highland interior.<sup>37</sup> During the early months of 1817, he united a force of 2,000 men and took up positions at Nautla on the gulf coast of Veracruz.<sup>38</sup> However, royalist troops under the direction of Benito Armiñan assaulted and subdued this fortified point.<sup>39</sup>

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<sup>36</sup> Apodaca al Ministro de Guerra, México, 10 de marzo de 1817, AGN: Historia, vol. 152, sec. 2, no. 1, fols. 152-153.

<sup>37</sup> Apodaca al Ministro de Guerra, México, 30 de noviembre de 1816, AGN: Historia, vol. 152, sec. 2, no. 5, fols. 119-120.

<sup>38</sup> Apodaca al Ministro de Guerra, México, 31 de diciembre de 1816, AGN: Historia, vol. 152, sec. 2, no. 8, fol. 129.

<sup>39</sup> Ibid.

Taking flight, Victoria regrouped around the town of Misantla which for the past five years had successfully held out against the royalists. On 23 March, 1817, Coronel José Joaquín Márquez defeated the insurgents at Misantla although Victoria again evaded capture. Over the course of the next three months "numerous small gangs" harassed Márquez in the Misantla area preventing him from giving chase to Victoria.<sup>40</sup> As Christon Archer has noted, insurgents in Veracruz maintained a "near-permanent albeit low level [of] guerrilla activity." Hiding in the "impenetrable mountainous barrancas and isolated coastal swamplands" of this province, the rebels stored up their energies and burst forth as the occasion presented itself to block roads and interrupt royalist supply lines from the coast to the interior.<sup>41</sup>

The inability of the royalists to destroy the rebels once they had been flushed out from their fortified retreats slowed not only the pacification of insurgent territories, but also frustrated royalist attempts to revive the economy and to secure their lines of supply. To remedy this situation, the viceregal authorities, first under Calleja and then Apodaca, attempted to create a number of military roads in

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<sup>40</sup> Apodaca al Ministro de Guerra, México, 30 de abril de 1817, AGN: Historia, vol. 152, sec. 2, no. 17, fols. 163-164. According to Arthur DeVolder, Viceroy Apodaca announced on a number of occasions in the *Gazette* that Guadalupe Victoria had been killed in battle against the troops of the crown. Much to the viceroy's embarrassment, Victoria would subsequently reemerge at another point to continue his operations against the viceregal authorities. See, DeVolder, *Guadalupe Victoria*, 31. On the continued presence of rebels in the Misantla area, see, Apodaca al Ministro de Guerra, México, 30 de junio de 1817, AGN: Historia, vol. 152, sec. 2, no. 21, fol. 182.

<sup>41</sup> Archer, "The Young Antonio López de Santa Anna," 5-6.

order to overcome the problem of supply and lay the ground work for an economic recovery.<sup>42</sup>

The most important transport corridor from the interior of New Spain linking the capital with the interior cities of the Bajío and the northern port of Tampico ran through the city of Querétaro and along the western periphery of the Llanos de Apan. Since the beginning of the insurrection, constant insurgent attacks effectively disrupted communications and commercial traffic along this route. During the tenure of Calleja, the Llanos de Apan became a major zone of insurgent activity under José Francisco Osorno, a former lieutenant of Morelos. In the closing months of his term, Calleja ordered Coronel Manuel de la Concha to eliminate Osorno's influence over the area.<sup>43</sup> The operations of Concha met with considerable success and, in their frustration, the hard pressed rebels resorted to burning the haciendas and towns which dotted the path of their retreat toward the refuge of the Huasteca near the border of northern Mexico and Veracruz.<sup>44</sup>

Coronel Concha's campaign in the Llanos de Apan stalled, as did nearly every other major royalist offensive after 1816, due to a shortage of resources. Moreover, the scorched earth policy pursued

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<sup>42</sup> In February 1817, for example, Apodaca charged Brigadier Francisco Javier de Gabriel and others with the task of "opening" the territory between Jalapa and Veracruz. Royalist divisions in this area were to maintain forces along the road in order "to consolidate the pacification [process] and to prevent the formation of new rebel gangs." Apodaca al Ministro de Guerra, México, 28 de febrero de 1817, AGN: Historia, vol. 152, sec. 2, no. 11, fol. 147.

<sup>43</sup> Alamán, *Historia de Méjico* 4: 258-260.

<sup>44</sup> Apodaca al Ministro de Guerra, México, 31 de octubre de 1816, AGN: Historia, vol. 152, sec. 2, no. 1, fol. 113.

by the rebels prevented Concha from securing supplies from the local countryside. Seeking to speed up the pacification of this area, Apodaca commandeered 30,000 pesos from the treasury of Pachuca to succor Concha's troops. Bolstered by fresh supplies and aided by newly arrived troops under the command of Coronel Marqués Donallo, Concha restored order to much of the Llanos south of Tulancingo.<sup>45</sup>

However, in the territory north of Tulancingo, the rebels regrouped under the leadership of José Joaquín Aguilar. Operating beyond the reach of Concha and Marqués Donallo, Aguilar's band successfully disrupted the flow of goods from the port of Tampico to Querétaro and the interior. Responding to this new situation, Apodaca directed Lieutenant Coronel Carlos María Llorente of Tuxpan to pursue and destroy Aguilar's insurgent band.<sup>46</sup> By January, 1817, Llorente had successfully cleared a wide strip in the Huasteca stretching from Papantla in Veracruz in the south to Paloblanco in the north thereby opening the road from Tampico.<sup>47</sup> Despite Llorente's success, Apodaca admitted to the Minister of War that goods travelling from Tampico and other points through Querétaro to Mexico City still suffered at the hands of insurgent gangs which maintained a phantom life in the Sierra Gorda highlands located to

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<sup>45</sup> Ibid.

<sup>46</sup> Ibid., fol. 114.

<sup>47</sup> Apodaca al Ministro de Guerra, México, 31 de diciembre de 1816, AGN: Historia, vol. 152, sec. 2, no. 8, fols. 128-30.

the east of Querétaro in the Huasteca.<sup>48</sup> This situation continued at least until June, 1817, when Apodaca fortified the hacienda "Nieto" outside of Querétaro to contain those rebels who continued to operate in this area.<sup>49</sup> Subsequent to the creation of the garrison at Nieto, Apodaca reported that a convoy from the interior provinces of Zacatecas and Durango guarding a considerable quantity of silver and 17,500 head of cattle arrived safely in the capital via the Querétaro route. Significantly, Apodaca made no mention of the size of the convoy's escort.<sup>50</sup>

Despite the safe arrival of this convoy, there is no reason to assume that the addition of Nieto to the other fortified towns and haciendas of the area eliminated the problem of insurgent raids against commercial traffic along the military road. Indeed, according to Carlos María de Bustamante, an insurgent captain named Atanasio Duro continued to operate in the Querétaro region until at least June, 1819. At this point, the royalist José Cristóbal Villaseñor took Duro's wife hostage in an attempt to force the surrender of the insurgent cabecilla. Duro, however, resisted and Villaseñor executed the woman. Moreover, Villaseñor directed his troops to seize 100 head of cattle from local haciendas and ranchos to discourage them from lending assistance to the recalcitrant Duro who remained at large.<sup>51</sup>

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<sup>48</sup> Apodaca al Ministro de Guerra, México, 31 de enero de 1817, AGN: Historia, vol. 152, sec. 2, no. 9, fol. 139.

<sup>49</sup> Apodaca al Ministro de Guerra, México, 11 de junio de 1817, AGN: Historia, vol. 152, sec. 2, no. 20, fol. 175.

<sup>50</sup> Apodaca al Ministro de Guerra, México, 30 de junio de 1817, AGN: Historia, vol. 152, sec. 2, no. 21, fol. 183.

<sup>51</sup> Bustamante, *Cuadro histórico* 3: 66.

Despite the success of Duro and others who enjoyed popular regional support, the policy of reducing rebel fortification and opening military roads did lead to a slight recovery of the economy of Mexico City.<sup>52</sup> Revenues flowing into the city treasury, derived in large measure from taxes levied on incoming goods, increased from a low of 141,000 pesos in 1816 to 189,000 in 1817. Revenues for the year 1818 (200,000 pesos), confirmed the upward trend in the economy of the capital. In his study of the finances of Mexico City during the war, Timothy Anna credited this recovery to the revival of agriculture, mining, and manufacturing in those provinces cleared of rebels.<sup>53</sup> However, when comparing the figures for 1817 and 1818 with those regularly sustained during the decade immediately preceding the independence wars, the full extent of the recovery must be described as slight at best.<sup>54</sup> Moreover, it seems likely that, given its position as the seat of viceregal authority, Apodaca paid

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<sup>52</sup> In October 1816, Apodaca wrote to the Minister of War that "Mexico City and its immediate environs are completely quiet and the city is regularly furnished with all variety of consumer goods which are freely introduced into the market from all directions." However, he noted that the road between Mexico City and Puebla remained at the "total mercy of the rebels." Apodaca subsequently directed Coronel Francisco de Hevia to construct several forts in order to protect the principal roads of the region. Timothy Anna stated that safe traffic in this region was not restored until December 1816 at which time regular convoys passed through the area with only small escorts. Apodaca al Ministro de Guerra, México, 31 de octubre de 1816, AGN: Historia, vol. 152, sec. 2 no. 1, fol. 114; Anna, *The Fall of the Royal Government*, 149.

<sup>53</sup> Timothy Anna, "The Finances of Mexico City During the War of Independence," *Journal of Latin American Studies* 4 (1): 64-65.

<sup>54</sup> From the figures provided by Anna for the years 1803 to 1807 the average yearly total of revenues collected by the treasury of Mexico City amounted to approximately 340,000 pesos or a full 140,000 more than what was collected during 1818. *Ibid.*, 65.



disproportionate attention to the restoration of Mexico City's economy at the expense of other urban centers. Certainly, Apodaca was more conscious of conditions in the capital. On 31 December, 1816, Apodaca wrote to the Minister of War that "the number of robberies and assassinations in [Mexico City] has reached a scandalous level."<sup>55</sup>

Outside of Mexico City, evidence does exist to suggest that Guadalajara and some other cities enjoyed relative prosperity during the war years. Eric Van Young even went so far as to state that "the years 1812 to 1817 were apparently ones of unparalleled prosperity for the merchants of Guadalajara." However, Van Young made no clear connection between this apparent prosperity and the recovery of the domestic economy of the colony. Indeed, he attributed much of the recovery to an upswing in foreign trade during the war years.<sup>56</sup> In fact, Guadalajara owed its buoyant economy to the illegal trade being conducted by merchants from Panama, England, and the Far East. Despite the illicit nature of this trade, Brigadier José de la Cruz gave his approval to the arrangement in light of Mexico City's inability to provide Guadalajara with sufficient supplies and consumer goods.<sup>57</sup> Both Mexico City and Guadalajara, therefore, should be regarded as poor or, at least, suspect indicators of the

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<sup>55</sup> Apodaca al Ministro de Guerra, México, 31 de diciembre de 1816, AGN: Historia, vol. 152, sec. 2, no. 8, fol. 133.

<sup>56</sup> Eric Van Young, *Hacienda and Market in Eighteenth-Century Mexico: The Rural Economy of the Guadalajara Region, 1675-1820* (Berkeley: University of California Press, 1981), 146.

<sup>57</sup> Carlos Bustamante, *Cuadro histórico* 3: 82-83, and 83 n. 1.

actual state of New Spain's economy after 1816. Other cities, Vera Cruz particularly, continued to suffer from the ill effects of war.<sup>58</sup> As the careers of Guadalupe Victoria and José Joaquín Aguilar demonstrate, the remote areas of the Mexican countryside remained the true home of the rebels from which they continued to disrupt New Spain's war torn economy.

To accelerate the pace of pacification and economic recovery, Viceroy Apodaca used an expansive amnesty policy to force a political end to the war. He reasoned that, if continuous pursuit did not result in the destruction of the rebels within a particular region, it might at least make their condition so unbearable that they would seek out the *indulto* in order to escape the hardship of unending flight.<sup>59</sup> Indeed, as Apodaca had hoped, a significant number of insurgents chose to appeal for amnesty. Available figures, however, vary widely. The most conservative estimates suggest that Apodaca issued some 17,000 pardons.<sup>60</sup> At the other extreme, Brian Hamnett calculated that the viceroy amnestied some 60,000 rebels.<sup>61</sup> Numerically, at least, the viceroy's solution to the ongoing insurgency produced dramatic results.

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<sup>58</sup> Christon Archer reported that the population of Vera Cruz, as an indicator of the ongoing negative impact of the war, declined from 15,000 in 1810 to 8,943 in 1818. See Archer, "The Young Antonio López de Santa Anna," 6.

<sup>59</sup> Apodaca al Ministro de Guerra, México, 28 de febrero de 1817, AGN: Historia, vol. 152, sec. 2, no. 11, fol. 147.

<sup>60</sup> Timothy Anna cites this figure which he obtained from H.G. Ward's history, *Mexico in 1827*; Anna, "An Essay on the Mexican Viceroys," 71.

<sup>61</sup> Hamnett, "Royalist Coalition," 73. Hamnett cited Apodaca's letter to the Minister of War dated from the end of December 1818 in which the viceroy claimed to have pardoned 29,818 insurgents. *Ibid.*, 73, n. 32.

Yet, as impressive as these figures seem, the amnesty program created as many problems as it solved. After the surrender of Guadalupe Victoria's stronghold at Monteblanco in November, 1816, some 300 hundred rebels petitioned *en mass* for the viceroy's amnesty. Initially, the question of what to do with such large numbers of pardoned rebels puzzled Apodaca. On this occasion, he wrote to the Minister of War that it was simply not feasible to release the former rebels into pacified territories. On the other hand, he pointed out that imprisoning them all would bankrupt the nation. The majority, he concluded, should be absorbed directly into the royalist military. Some few others - particularly peninsular deserters who joined the insurgent cause - would be sent overseas.<sup>62</sup>

On the surface, the benefits of incorporating amnestied rebels into the royalist army appeared substantial. The timely defection of two of José Osorno's principal lieutenants, Joaquín Espinosa and Miguel Serrano, to the royalists in July, 1816, greatly accelerated Concha's pacification of the Llanos de Apan. In return for their service - their knowledge of the terrain and of Osorno's favoured retreats and hideouts - Concha provided Espinosa and Serrano with commissions in the royal army and allowed them to lead the same men who had served under them while they fought for independence.<sup>63</sup> In another example, Ramón Rayón, after

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<sup>62</sup> Apodaca al Ministro de Guerra, México, 30 de noviembre de 1816, AGN: Historia, vol. 152, sec. 2, no. 5, fols. 119-120.

<sup>63</sup> Alamán, *Historia de Méjico* 4: 260-264. Ordinarily, former rebels cabecillas who went over to the royalists received reduced ranks. However, one rebel captain in Veracruz (Captain Vergara) was amnestied along with all of his troops who in turn, formed a new unit named "the Royalists of San Carlos." In

surrendering at Copóro, assisted the royalists in their attack on Nicolás Bravo who had lodged himself during the summer of 1817 in this very same retreat. Rayón's intimate knowledge of his former stronghold proved so valuable during the royalist attack (1 September, 1817) that the viceroy commissioned him as a lieutenant coronel within the royal army.<sup>64</sup> Troops under Armijo's command eventually captured Bravo in December 1817. Armijo described to the viceroy Bravo's potential worth to the royalist cause stating that he was "a leader of the first order whose influence throughout the entire tierra caliente was incalculable." Armijo hoped that with his surrender, Bravo would lend his support to the pacification of southern Mexico. However, unlike Rayón, Espinosa, and Serrano, Bravo refused to assist the viceregal authorities.<sup>65</sup>

Typically, many insurgent cabecillas chose to serve in the royal army in order to guarantee the continuation of their influence and power within their former territories of operations. On 22 January, 1818, for example, Brigadier Vicente Vargas submitted to the indulto at Toluca west of Mexico City. The royalists, in turn, gave Vargas the command over a counterinsurgency force raised at Tenancingo located a short distance to the south of Toluca. Thus, Vargas continued to lead a substantial military force within the same territory he had presided over as an insurgent. Yet, after twenty

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this instance, the amnestied insurgent leader retained his former rank. Bustamante, *Cuadro histórico* 3: 51.

<sup>64</sup> Alamán, *Historia de Méjico* 4: 416-419.

<sup>65</sup> *Ibid.*, 424.

months of service as a royalist, Vargas rejoined the insurgency calculating that his personal fortunes would be best served by linking up with Vicente Guerrero and Pedro Ascencio who continued to dominate much of the tierra caliente.<sup>66</sup>

The tendency of former rebels leaders to renege on their promise of service to the crown demonstrated that personal interests superceded any new found loyalty to the king. Apodaca soon realized that, for many former insurgents such as Vargas, the indulto provided a simple expedient which permitted them to avoid the complete disintegration of their own personal influence. In disgust Apodaca wrote to the Minister of War that many amnestied rebel cabecillas believed:

that they should be compensated for their submission despite the obvious fact that [it] did not proceed from their own volition but from the necessity of conserving their very existence.<sup>67</sup>

Moreover, conspiracies formulated by amnestied insurgent chieftains to improve the conditions of their 'retirement' at the expense of the

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<sup>66</sup> Ibid., 414.

<sup>67</sup> In light of his brother's surrender of Copóro, Ignacio Rayón informed Aguirre that he too would submit to the mercy of the crown in return for a passport to the United States and a pension of 8,000 pesos. Likewise, Manuel Terán, surrounded by the forces of the crown at the convent of San Francisco, promised to surrender peacefully in return for free passage to London in addition to an unspecified pension. Apodaca ordered his commanders not to countenance such proposals made by these ignoble men who were "filled with pride and infatuated with the titles which they [had] taken for themselves." However, the practice of rewarding former rebels continued despite Apodaca's order. In June, 1818, ex-Mariscal de Campo Juan Pablo Anaya received, in return for his surrender, a commission in the royal army and a pension of 50 pesos per month. Apodaca al Ministro de Guerra, México, 28 de febrero de 1817, AGN: Historia, vol. 152, sec. 2, no. 11, fol. 148.; Alamán, *Historia de Méjico* 4: 433.

crown provided the most damning evidence of the rebel opportunism.<sup>68</sup>

While rebel cabecillas received some tangible advantage by applying for the indulto, the average insurgent fighter derived little benefit from the king's pardon. In June, 1817, eager to confirm the success of his amnesty program, Apodaca informed the Minister of War that many thousands of former rebels, whom he described as both laborers and artisans, had "resumed their former productive lives within the bosom of their families and former communities."<sup>69</sup> In fact, amnestied rebels faced a more difficult reality than the viceroy was prepared to admit. Most haciendas offered little employment. Grain prices rose to levels which were beyond the means of the poorer classes which made up the bulk of the amnestied rebels. Employment within the mines or in the cities, moreover, was extremely scarce. Commenting on the state of New Spain in the period 1818-1820, Rafael Muñoz noted that the failure of the viceregal authorities to restore the economy, coupled with ever rising levels of taxation, left "thousands . . . unemployed both in the cities and the countryside."<sup>70</sup> Facing intense hardship upon their

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<sup>68</sup> The most notable incident which took place during 1818 involved José Osorno, Miguel Serrano, and Joaquín Espinosa. Alamán, *Historia de Méjico* 4: 444-445; Miguel i Vergés, ed., *Diccionario de Insurgentes*, 187, 348.

<sup>69</sup> Apodaca al Ministro de Guerra, México, 30 de junio de 1817, AGN: Historia, vol. 152, sec. 2, no. 21, fol. 184.

<sup>70</sup> Rafael F. Muñoz, *Santa Anna, el dictador resplandeciente* (Mexico, 1945), 28.

return to civilian life, many amnestied rebels resumed their former professions as guerrilla-bandits.<sup>71</sup>

In an attempt to overcome the problems of unemployment and the lure of banditry, some royalist commanders established resettlement programs to provide for the subsistence of amnestied rebels. In Veracruz, for example, Brigadier Marshal Pascual Liñan convinced landowners to permit former rebels to settle and work, free of rent, on those lands left unoccupied as a result of the war. Ideally, such a program would satisfy the needs of the former insurgents while restoring the productive capacity of previously ruined estates. In 1819, Liñan directed Captain Antonio López de Santa Anna resettle amnestied insurgents in the towns of Medillín and Xamapa.<sup>72</sup> Arguably, the success and popularity of this program did less to endear amnestied rebels to the crown than to their immediate benefactor, Santa Anna.<sup>73</sup>

In the Bajío, the Commander General of Guanajuato, Antonio Linares, attempted to implement a program similar to Liñan's resettlement strategy. The arrival of the renegade Spanish liberal Francisco Javier Mina in the Bajío in the summer of 1817 intensified insurgent activity in the region. Both León and Pénjamo, moreover,

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<sup>71</sup> Archer, "Banditry and Revolution in New Spain, 1790-1821," Bibliotheca Americana 1 (2): 87. Manuel Vidaurre, a former minister of the Cuzco audiencia described to the king the reasons which motivated former rebels to reenter the insurgency in Peru: "When a man has nothing . . . he becomes a rebel, because in order to survive no other recourse remains to him but a resort to arms." Quoted in Anna, "The Last Viceroys," 56.

<sup>72</sup> Archer, "The Young Antonio López de Santa Anna," 13-14.

<sup>73</sup> Muñoz, *Santa Anna*, 25-26.

continued to hold out as intractable focos of insurgent activity until 1819.<sup>74</sup> Although active campaigning on the part of such royalist officers as Anastasio Bustamante eventually restored the dominance of the viceregal authorities, Linares determined that a more positive approach was necessary to consolidated the successes won through the use of force.<sup>75</sup>

Continued insurgent raiding in the Valley of Santiago in southern Guanajuato forced Linares to realize that, so long as the rebels could find no practical means of subsistence, peace in the Bajío would remain partial at best. Responding to this situation, Linares proposed to colonize larger properties with amnestied rebels who, in return for the privilege of maintaining their own rancho, would be responsible for the defense of the larger estate.<sup>76</sup> By 1820, Alamán estimated that Linares organized some 6,000 former rebels into defense companies known as *rurales* or *auxiliares*.<sup>77</sup> However, the effectiveness of the rurales was limited. Brian Hamnett observed that within a short time of the creation of protective colonies on the haciendas, the hacendados began to press the amnestied insurgents for burdensome rents. The rural defense units, as a result, began to demobilize spontaneously.<sup>78</sup>

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<sup>74</sup> Bustamante, *Cuadro histórico* 3:545 passim; Hamnett, "Royalist Counterinsurgency," 45.

<sup>75</sup> Brian R. Hamnett, "Anastasio Bustamante y la Guerra de Independencia, 1810-1821," *Historia Mexicana* 28 (4): 531.

<sup>76</sup> *Ibid.*, 529-531.

<sup>77</sup> Alamán, *Historia de Méjico* 4: 439.

<sup>78</sup> Hamnett, "Anastasio Bustamante," 528.



At best, the amnesty policy provided only a partial solution to the problem of insurgency in New Spain. Insurgent cabecillas opted to use or ignore the royal pardon as circumstances dictated. The question of subsistence preoccupied the minds of the former rebels, leader and follower alike. Where the terms of the *indulto* failed to provide adequately for the 'repentant' insurgents, they tended to coalesce under the leadership insurgent cabecillas who continued to hold out against the royalists.

Operating in the southern *tierra caliente*, Vicente Guerrero stands out as the most famous rebel who steadfastly refused to surrender to the mercy of the crown.<sup>79</sup> In addition to Guerrero, 'el Indio' Pedro Ascencio organized an insurgent territory around Tlatlaya in the hot country of southern Mexico. Over the course of 1819 and much of 1820, Ascencio won victories over the royalists at Tasco, Iguala, and el Cerro de la Ruida. Seeking to secure his hold over this region, Ascencio enlisted rural Mexicans into "militia forces" similar to those raised by the crown under its counterinsurgency plan. By his success, Ascencio, like Guerrero, became a magnetic pole around which uprooted insurgents gravitated.<sup>80</sup> Other insurgent foci, such as Coyoxquihui located in the mountains of northern Veracruz and Puebla between the towns of Papantla and Misantla, continued to offer refuge to those rebels who rejected the *indulto*.<sup>81</sup> Insurgency

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<sup>79</sup> Carlos Bustamante provides the most thorough treatment of the campaigns of Vincente Guerrero. See, Bustamante, *Cuadro histórico* vols. 2, 3.

<sup>80</sup> Bustamante, *Cuadro histórico* 3: 98-100.

<sup>81</sup> Coyoxquihui held out against the royalists from 1813 to 1820. *Ibid.*, 57-58.

in such areas developed into a way of life which no amount of coercion could overcome.

By 1820, the royalist army had, in any case, lost the will to root out these remaining pockets of resistance. In 1817, the condition of the troops was such that, upon the landing of Mina in the north, Brigadier Joaquín Arredondo desperately urged the Apodaca to send immediate reinforcements to relieve his own forces which he described as being naked, exhausted, and prone to desertion.<sup>82</sup> The following year, Apodaca requested the Minister of War to send 3,000 replacement troops from the peninsula to reduce the burden borne by his faltering troops. As Archer observed, the reinforcements never arrived and the viceroy was forced to rely on "Mexican delinquents, criminals, and amnestied rebels" to carry through his pacification plan.<sup>83</sup>

A near total breakdown in discipline within the royalist army undermined Apodaca's determination to prosecute the war. On a general level, the practice of garrisoning troops in dispersed locations disrupted channels of command leaving the troops cut off from

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<sup>82</sup> For the correspondence of Arredondo with Apodaca during the Mina invasion see AGN: Historia, vol. 152, sec. 1. fols. 1-110. In April, 1816, the Minister of War complained to the king that desertion in New Spain was rampant. Morale had deteriorated to the point where peninsular troops equated service in the New World with a death sentence. To avoid this fate, many deserted immediately upon their arrival. Margaret L. Woodward, *The Spanish Army and the Loss of America, 1810-1824*, Hispanic American Historical Review 48 (4): 593-595.

<sup>83</sup> Archer, "Where did all the Royalists Go? New Light on the Military Collapse of New Spain, 1810-1822," Jaime E. Rodríguez O., ed., *The Mexican and Mexican-American Experience in the Nineteenth Century* (Tempe, Ariz.: Bilingual Press, 1989), 36.

central direction and control.<sup>84</sup> Individual units, isolated from the influence of superior authorities, obstinately refused to venture forth in pursuit of the rebel forces which continued to occupy inaccessible defensive position.<sup>85</sup> On a more immediate level, the inability of the royalist authorities to pay the troops exacerbated an already serious situation. Left to secure their own subsistence, many impoverished units sank into a state of total chaos. In one instance during 1820, a detachment of troops from the "Regimiento Provincial de Dragones Fieles de Potosí" stationed at Izúcar "robbed and murdered civilians with near total impunity."<sup>86</sup> Over the course of the war, the distance which separated the condition of the individual royalist soldier from that of the insurgent narrowed considerably as a result of severe privation, exhaustion, and boredom.<sup>87</sup>

In a development even more damaging to the royalist cause, many counterinsurgent commanders gradually adopted attitudes which reflected those held by their insurgent counterparts. Individual commanders became increasingly concerned with their own power and influence. Like the collapse in discipline among the troops, this condition derived from the implementation of the

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<sup>84</sup> In 1818, Matías Martín y Aguirre informed the viceroy that the dispersion of companies under his commander was so great that it was impossible to complete monthly reports on their status. As Christon Archer noted, "when [Aguirre] requested manpower lists and other information [from his units], either he received no response or a badly drafted document that was next to useless." Archer, "Where did All the Royalists Go?" 33.

<sup>85</sup> Archer, "Bandits and Revolution," 87.

<sup>86</sup> Archer, "Where Did All the Royalists Go?" 32.

<sup>87</sup> Archer, "Bandits and Revolution," 86.

royalist counterinsurgency plan in the countryside. Brian Hamnett has indicated that the plan, as developed by Calleja and continued by Apodaca, placed royalist commanders "directly into contact with village and small town" populations to a degree hitherto unknown.<sup>88</sup> Assuming tremendous authority over daily life within entire regions, military commanders became powers unto themselves at the expense of the established civilian officials and administrators.<sup>89</sup> In this situation, military power became the tool for personal gain. Counterinsurgent commanders made use of such practices as the fraudulent sale insurgent property, extortion, and grain speculation to amass considerable personal fortunes.<sup>90</sup> As the war dragged on, royalist commanders increasingly became inclined to regard the ongoing insurgency as part of an emerging *status quo*. Rather than carry the fight to the insurgents, as Archer has noted, many royalist commanders "concluded unofficial trading alliances and other mutually profitable agreements with the rebels in the countryside."<sup>91</sup>

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<sup>88</sup> Hamnett, "Royalist Counterinsurgency," 23.

<sup>89</sup> See Christon Archer, "The Royalist Army in New Spain: Civil-Military Relationships, 1810-1821," Journal of Latin American Studies 13 (1): 57-82.

<sup>90</sup> For a discussion of the crimes committed by Coronel Melchor Alvarez between the years 1813 to 1821 see Archer, "Where Did All the Royalists Go?" 30-31. The most famous example of the abuse of military power centers around coronel Agustín de Iturbide. According to Alamán's account, Iturbide was accused of working through "civilian agents" in order to secure grain and other produce from haciendas which allegedly belonged to insurgents. Once appropriated, the grain was sold at scandalously high prices. Furthermore, according to Brian Hamnett, Iturbide was accused of illegally confiscating 1,300,000 pesos from the public treasury of Guanajuato. Alamán, *Historia de Méjico* 4: 290-292; Hamnett, "Royalist Counterinsurgency," 42.

<sup>91</sup> Christon Archer, "The Army of New Spain and the Wars of Independence, 1790-1821," Hispanic American Historical Review 61 (4): 713-714.

The inability of the royalists to eliminate the insurgency along with the breakdown of discipline and the consequent growth of self-interest within the ranks of the royalist army facilitated the final independence of Mexico. In 1820, Apodaca commissioned Coronel Agustín de Iturbide to root out the forces of Vicente Guerrero in southern Mexico. Once clear of Apodaca's authority, Iturbide renounced the royalist cause in order to pursue independence. Traditionally, historians have argued that a conservative reaction against the restoration of the liberal constitution of 1812 spurred Iturbide's actions.<sup>92</sup> According to this thesis, Iturbide betrayed the royalist cause in order to prevent the radical liberal assaults on the church and elite privileges from being implemented in New Spain. Essentially, as John Lynch argued, the Cortés alienated the Spanish army in New Spain by attacking its *fuero* privileges.<sup>93</sup>

However, it is unlikely that the question of *fuero* rights played a decisive role in the decision of Iturbide and the royalist army to pursue independence. Indeed, as Doris Ladd has noted, some royalist officers who lent their support to Iturbide and his Plan de Iguala pledged to relinquish their rights under the *fuero* once independence

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<sup>92</sup> Zavala, *Ensayo crítico* 2: 84.

<sup>93</sup> John Lynch, *The Spanish American Revolutions 1808-1826*, 2d ed. (New York: W.W. Norton & Company, 1986), 319-320. Mexican society, reflecting the culture of the peninsula, contained a number of semi-autonomous corporations. Bodies such as the merchant guilds, the clergy, and the military possessed numerous special privileges. The military *fuero* exempted its holders from trial in civilian courts. For a thorough discussion of the military *fuero* in New Spain, see, Lyle N. McAlister, *The "Fuero Militar" in New Spain, 1764-1800* (Gainesville: University of Florida Press, 1957).

had been achieved.<sup>94</sup> According to Archer, an issue which more directly threatened the position of the military concerned the *contribuciones militares*, the militia support taxes collected to maintain the rural and urban defense forces throughout New Spain. With the restoration of the Constitution, the administration of these taxes passed from the jurisdiction of special *juntas de arbitrios* to city, town, and village *ayuntamientos*. Civilian authorities, strengthened by the Constitution voted to end the collection of the militia support taxes. The net affect was the immediate disintegration of the local militias throughout New Spain.<sup>95</sup>

Such moves by the civilian officials to reassert their authority under the auspices of the constitution threatened to undermine the influence accumulated by the royalist officer corps. For creole officers, the military power that they wielded through the course of the war transformed their status. After ten years of war, as Frank Samponero asserted, it was no longer possible to characterize the creole officers as "individuals who valued their military commissions for reasons of social prestige."<sup>96</sup> Creoles in the royalist army now possessed real political and economic influence as a result of their military power. This, in turn, led to the formation of a loose *esprit de*

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<sup>94</sup> Doris Ladd, *The Mexican Nobility at Independence, 1780-1826* (Austin: University of Texas Press, 1976), 126.

<sup>95</sup> Archer, "Where Did All the Royalists Go?" 37.

<sup>96</sup> Frank Samponero, "The Political Role of the Army in Mexico 1821-48" (Ph.D. diss., State University of New York at Stony Brook, 1974), 20.

*corps* which united creoles officers around common objectives determined by self-interest.<sup>97</sup>

Moreover, the emerging sense of unity in the royalist military extended to include the numerous peninsular officers serving in New Spain. Indeed, long years of service in Mexico rooted these officers in the American soil. Their interests developed along the same lines as those of their creole counterparts; they too amassed fortunes and influence through their use of military power. Desiring to maintain their lucrative regional commands, royalist officer such as Gabriel de Armijo and Joaquín Arredondo embraced Iturbide's promise of union between Europeans and Americans in the new nation and became "overnight patriots."<sup>98</sup> The royalist army united behind the leadership of Iturbide to pursue independence not simply because they opposed the restoration of the 1812 constitution, but because the political crisis generated by that event presented them with the opportunity to guarantee their continued influence over society. Simply put, the army had become "politically ambitious."<sup>99</sup>

External events, the restoration of the liberal constitution, precipitated Mexican independence. Constant political turmoil in the Spain undermined its claim to legitimacy in the Americas.<sup>100</sup> However, this one incident provides only a partial explanation to the independence process. After 1816, a number of developments

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<sup>97</sup> Hamnett, "Royalist Coalition," 83.

<sup>98</sup> Archer, "Where Did All The Royalists Go?" 43,

<sup>99</sup> Hamnett, "Anastasio Bustamante," 538.

<sup>100</sup> Timothy Anna, *Spain and the Loss of America* (Lincoln: University of Nebraska Press, 1983), *passim*.

occurred which prepared the way for Iturbide and the royalist army to bring Mexico to independence. In the broadest sense, Apodaca simply failed to win the war. He tried unsuccessfully to balance the sanguinary approach of Calleja - in the form of constant pursuit - with a new moderate policy which stressed reconciliation. The indulto - Apodaca's greatest tool of accommodation - proved ineffective where former insurgents could not secure even minimal subsistence. Insurgency became a way of life. Violence, in the context of war, became customary and survival primary.

The task of rooting out this kind of insurgency surpassed the ability of royalist military. The defeat of Morelos offered the troops of the crown no immediate respite. The persistence of major rebel fortifications demanded their unceasing attention. Despite Apodaca's eagerness to announce an end to the war in early 1817, the chore of reducing these points continued well into 1820 when Iturbide first began to conspire against the Spanish authorities. Exhaustion became a critical factor in the willingness and ability of the royalist army to bring the war to a definite conclusion. Moreover, their will was diluted by the mixing of the armies brought about as a result of Apodaca's amnesty policy. The condition of the troops on both sides of the conflict began to converge. Subsistence, in the absence of regular pay and an efficient supply system, prompted royalist troops to take matters into their own hands.

Self-interest within the military, both insurgent and royalist, proved to be the decisive factor in the independence of Mexico. Despite the atomization of the insurgency and the failing fortunes of the broader revolutionary cause after 1815, the ability of individual



cabecillas to maintain themselves within regional theaters of operations was by no means diminished. Within such areas as the tierra caliente, Guanajuato, and Veracruz, insurgent leaders retained an undeniable influence right up to the end of the war. Economic self-interest motivated some royalist officers to recognize the positions of their insurgent counterparts. In other instances where royalist commanders retained their determination to pursue insurgent holdouts, rebel chieftains expeditiously joined with their enemies in an attempt to retain at least a portion of their former power. For the royalist military, on the other hand, Iturbide's Plan de Iguala represented an opportunity to not only retain power accumulated over the course of the war, but to expand it within the boundaries of the new independent nation.

## Conclusion

Until Porfirio Diaz brought stability to Mexico in the late nineteenth century, the military dominated society and politics. Chronic disorder reflected a lack of unity within the army. Iturbide won independence by joining the greater part of the royalist army with the insurgents. Yet, within that amalgam, no modern sense of professionalism existed to preserve the original union. Military commanders joined with Iturbide to maintain and potentially to enhance their new found status in society. Beyond this, individual commanders remained rooted within regional territories of control. Self-interest continued to dictate their loyalties. This was the true legacy of the insurgency; each military commander with sufficient regional support became a political aspirant in his own right. Military power became the principal "vehicle to attain political power".<sup>1</sup>

When drawing conclusions on the role of insurgency in the independence era, Brian Hamnett's assertion that the insurgents essentially lost the political struggle for independence can be accepted as valid. Hidalgo's attempted revolution to displace the European Spaniards failed when he appealed to the masses. The popular classes hardly shared the creole vision of change. Their motivations for participating in the conflict spanned a diverse range of locally defined interests. The campesinos who rose up under

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<sup>1</sup> Frank N. Samponero, "The Political Role of the Army in Mexico, 1821-1848." (Ph.D. diss., State University of New York at Stony Brook, 1974), iv.

Hidalgo acted on the basis of idealized perceptions of a former condition. As backward looking revolutionaries, they sought to restore the traditional balance of community relations. Villagers used the opportunity provided by Hidalgo's revolt to redress local grievances against neighboring hacendados or loathsome petty officials who insulted or victimized townsfolk. Moreover, the linking agents who mobilized the armed support for Hidalgo's insurrection from the discontented lower classes possessed their own independent agendas. Hidalgo's attempted revolution mobilized a diverse, contradictory array of interests which alienated creole support and strengthened the ability of the royalists to resist this challenge to their control over New Spain.

Subsequent rebel leaders, most notably Ignacio Rayón and José María Morelos, failed to create a concerted revolution out of the insurgency which developed in the wake of the Hidalgo revolt. Within the insurgent camp, rebel cabecillas took advantage of the disruptions of war to increase their own power, wealth, and prestige, inside specific regions. In this context, insurgency often appeared as nothing more than sheer banditry. The behavior of such insurgent chiefs as Albino García and the members of the Villagrán clan is most often regarded in this light. Banditry, however, need not be viewed as a negative development. Indeed, banditry and disorder helped create the conditions of instability in which change could eventually take place.

Eager to provide a more orderly face to the insurgency, both Rayón and Morelos condemned the self-aggrandizing acts carried out by independent rebel cabecillas and their followers as pure and

simple crimes that sabotaged the integrity of the revolution. Yet, the maintenance of each chief's power base depended on their ability to provide their followers with real material advantages. At the most basic level, this general rule defined the structure of the insurgent leadership. Competition for status and the ongoing need to provide for followers generated internecine conflict among regional cabecillas whose self-serving objectives undermined the potential for a successful revolution. As the possibility for resolving these internal conflicts became increasingly remote, the insurgency atomized and entrenched itself within loosely connected regional foci of rebellion.

However, the internal difficulties experienced by insurgents explain only one half of the atomization process. Although the rebel forces could not match the royalists in open confrontations, their use of hit and run guerrilla tactics threatened to wrest control of New Spain from the viceregal authorities. Recognizing the danger to continued Spanish control posed by conditions of generalized disorder, the royalists developed a counterinsurgency program to marginalize and eventually to destroy the insurgent forces.

The counterinsurgency program proposed by Félix Calleja in 1811 replaced counterproductive terror policies that drove populations further into the arms of the insurgency. Calleja recognized the imperative necessity of expanding royalist control from its largely urban base into the countryside to free the population from continued insurgent domination. Working with insufficient regular army troops, Calleja took the drastic step of arming the rural population in its own self-defense. In an attempt to further protect and to win over the loyalty of the rural population,

Calleja's plan provided for strategically placed regular garrisons which acted in conjunction with mobile assault forces. Through this structured approach to insurgency, Calleja planned to drive the insurgents out of ever expanding zones of royalist control into peripheral territories where they could be destroyed by coordinated royalist assaults.

Although Calleja's counterinsurgency program succeeded in forcing the rebels into more marginal areas, it failed to eliminate the insurgent threat completely. Driven to seek the refuge afforded by the inaccessible terrain of such areas as the sierras which surrounded the Bajío or the tierra caliente of the south, rebel forces continued to disrupt agriculture, mining, and commerce. Two basic problems frustrated royalist attempts to capitalize on the initiative afforded to them by the ongoing divisions within the insurgent camp. These can be summarized as problems of resources and issues of command. In human terms, the townsmen, villagers, and rural dependents recruited into the counterinsurgency regime proved to be poor soldiers. They lacked both training and weapons. Moreover, isolated from larger unit formations, the morale of garrisoned regulars declined as uniforms and equipment deteriorated. Although Calleja attempted to reestablish discipline within the counterinsurgent forces, problems such as desertion and insubordination continued to plague the royalist army. Moreover, the intractable nature of the war against the more disciplined forces of Morelos in the south throughout much of the period before 1816, continued to draw the attention and resources of the viceregal authorities away from the counterinsurgent campaigns being waged in other regions. After the

defeat of Morelos, the decentralization of command structures implicit in Calleja's counterinsurgency regime frustrated attempts to eliminate entrenched regional rebel focos of resistance. Individual royalist commanders, in pursuit of their own operational strategies, impeded attempts to coordinate offensives under the central direction of the viceroy.<sup>2</sup>

By 1816, any hope of a decisive insurgent military and political victory over the royalists was lost. Royalist counterinsurgency policies under Calleja forced the insurgents to change their tactical approach to the war. Unable to defeat the royalists in the field and being forced to abandon the free roaming practices typical in the conduct of such rebel leaders as Albino García, the rebels retreated into the inaccessible mountains and jungles of the colony. Here, they fortified themselves in fixed defensive positions from which they continued their raiding operations into occupied royalist zones. With the rebels physically isolated by the royalists and divided among themselves, the prospect of converting the insurgency into a full blown revolution seemed incredibly remote.

Even though the insurgents lost the political struggle for independence, it would be going too far to conclude that the war in New Spain had effectively come to a conclusion in 1816. Moreover, histories which depict the subsequent years up to 1821 as a period of stalemate underestimate the impact of the continuing insurgency. The fluidity of the struggle after 1816 is reflected in the changing royalist approach to the war. The new viceroy, Juan Ruíz de Apodaca,

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<sup>2</sup> See chapter 2, page 90, note 82 and pages 95-96, notes 97 and 98.

recognized that existing strategies could not defeat the insurgency and sought to impart a political solution to the war through the use of an extensive amnesty policy. Although a considerable if still undetermined number of insurgents applied for the royal amnesty, the available evidence suggests that the policy did little to actually put an end to the war in the countryside.

Indeed, widespread use of the amnesty dangerously diluted the loyalty of the royalist army by absorbing large numbers of former rebels into the service of the crown. Preoccupied with the preservation of their own power and influence, amnestied insurgent leaders often reneged on the *indulto* as conditions permitted. Moreover, the amnesty policy on its own, without a substantial economic recovery, could not guarantee that pardoned rebels would return to their homes. Certain royalist commanders, most notably Antonio Linares and Pascual Liñan, attempted to provide incentives for the pardoned rebels in the form of rent free lands to secure their compliance with the terms of the amnesty. However, these initiatives met with only limited success. Many amnestied rebels returned to the fold of the insurgency in order to secure subsistence through banditry and contraband trade. This was especially true in the *tierra caliente* of southern Michoacán and México, the western periphery of the Bajío, the highlands of the Sierra Gorda north and east of the capital, and in much of Veracruz.

As the insurgency dragged on, exhaustion undermined the ability of the royalist army to defeat or even to force the insurgents to submit to the king's pardon. In many units discipline completely evaporated and, in the absence of regular pay, royalist troops

increasingly adopted insurgent style tactics to secure their own subsistence. Royalist officers either could not or would not prevent such behavior. Over the course of the war and particularly as a result of the decentralization of command structure within the counterinsurgency regime, individual commanders assumed tremendous powers over daily affairs within their operational districts. Capitalizing on the instability produced by the insurgency, royalist officers used the armed might at their disposal to amass considerable personal fortunes. Like the rebel chieftains, royalist commanders increasingly became entrenched within regional military satrapies. Self-interest developed to replace the imperative of defeating the rebels. A new *status quo* was emerging with military commanders as the dominant actors. The restoration of the liberal constitution which threatened to reduce their power, not by depriving them of *fuero* rights, but by putting authority back in the hands of civilian officials, moved the military to defend their collective interests. With the independence of Mexico secured, regionally based military caudillos competed for supremacy within the new nation. By magnifying the importance of military power in society, insurgency during the years 1810 to 1821 left Mexico a legacy of instability and disorder which endured for decades beyond independence.



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